Virginia Immunization Information System

User Manual

Table of Contents

Introduction

In this chapter:

What Are Immunization Registries?
Why We Need Immunization registries?
The Virginia Immunization Information System

The following sections are an overview of immunization registries reproduced with the permission of All Kids Count, a nonprofit organization dedicated to the improvement of immunization rates in children.

What Are Immunization Registries?

Immunization registries are confidential, computerized state- or community-based information systems. In the *Healthy People 2010* program, the U.S. Department of Health and Human Services set a goal of enrolling 95% of children from birth through age five in a fully functioning immunization registry, noting “Population-based immunization registries will be a cornerstone of the nation’ immunization system by 2010.”

Registries enable public and private health care providers to consolidate and maintain computerized immunization records on all children within a given geographic area. They enable multiple authorized health care professionals to access the consolidated information on the immunizations that any child has received. They help doctors remind parents when their children are due or overdue for immunizations. They help health care professionals stay abreast of the complex immunization schedule.

Why We Need Immunization Registries

The U.S. now enjoys the highest immunization rates and lowest disease levels ever, but sustaining them is not easy. One of the greatest challenges is the growing complexity and volume of immunization information:

- Over 11,000 children are born each day, each needing 18-22 shots by age six to protect them from debilitating, life-threatening diseases.
- An increasingly complex childhood immunization schedule makes it difficult for health professionals to keep up, even with the help of books, charts, and training.
- Families are more mobile than ever before. They relocate, change employers, change insurers, and change doctors with increasing frequency.
- Research shows that many parents whose children are not up to date with their immunizations mistakenly believe that they are. Many doctors also overestimate the coverage of their patients.

- Because of increasing concerns about vaccine safety, some parents, in the absence of disease, may not choose to immunize their children. Better data about the immunizations given can help address these concerns.

Immunization registries help to avoid the “peaks and valleys” of disease outbreaks by providing accurate, up-to-date information about the immunizations that children receive.

The Virginia Immunization Information System

The Virginia Immunization Information System (VIIS) is a population-based Web application containing consolidated demographic and immunization history information. VIIS is able to perform a variety of functions for health care providers, including:

- Recording immunizations, contraindications, and reactions.
- Validating immunization history and providing immunization recommendations.
- Producing recall and reminder notices, vaccine usage and client reports, and Clinic Assessment Software Application (CASA) extracts.
- Managing vaccine inventory.

When a provider joins VIIS, immunization data from existing electronic data systems is loaded into the registry’ database. In addition, VIIS receives weekly birth, death, and adoption data from the Virginia Vital Statistics database. New births are generally loaded into VIIS within two to three weeks. VIIS also contains all Virginia birth data from January 1, 2001, to the present.

VIIS is provided free of charge to health care providers in Virginia To use the registry, providers are required to attend a VIIS training session and sign an enrollment agreement.

VIIS was developed as a joint project of the Virginia Department of Health and the Department of Immunization.

System Requirements

In this chapter:

Internet Access

Since VIIS is a Web-based application, you will need reliable Internet access, preferably with a dedicated connection, to access VIIS.

A modem connection will also work, but will perform more slowly. Using modem access with a cellular phone is not recommended. This type of connection is expensive and too unreliable to support a Web application.

Hardware Requirements

- The following are minimum hardware requirements for accessing VIIS:
- Pentium 100 MHz computer (500 MHz or higher recommended).
- 32 MB RAM (64 MB or higher recommended).
- 500 MB free disk space.
- Screen display set at a minimum of 800 x 600 resolution and 256 colors.
- Mouse.

Software Requirements

- Internet Browser software:
  - Microsoft® Internet Explorer, version 5.0 or higher, is strongly recommended. Internet Explorer version 4.0 will work provided it is equipped with all security upgrades.
  - Netscape® version 4.7x is compatible for use with VIIS.
- Windows® 95 and all subsequent Windows® versions.
- Adobe Acrobat Reader® 6.0 or higher.
- For networked computers, port 443 of the network firewall must be open for outgoing HTTPS (secure HTTP). To verify, try typing the VIIS Web address on your Internet browser: *https://www.viis.vdh.virginia.gov.* If you are unable to access the site, contact your network administrator.

Accessing VIIS

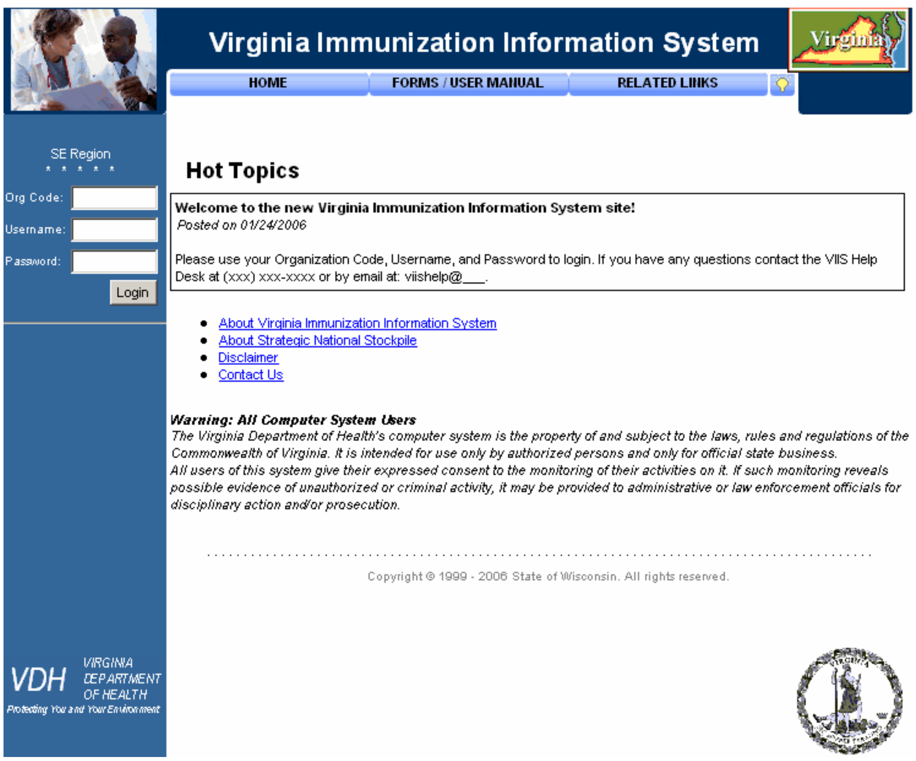
In this chapter:

Opening VIIS

To access the VIIS Web site, do the following:

1. Open your Internet browser. To open your browser, locate the browser icon on your computer's desktop (screen with program icons). Your icon will either be for Microsoft® Internet Explorer or Netscape®. Once you have located the icon, double click on it with your left mouse button.
2. Click File and choose Open (Open Web Location in Netscape®). If you are unable to see your browser's menu bar, you may have it set to Full Screen view. To switch this view, press F11 on your keyboard. This key toggles the Full Screen view on and off.
3. Type in the full VIIS address: https://www.viis.vdh.virginia.gov, Press OK (Internet Explorer) or Open (Netscape®). If you do not reach the VIIS security/certificate warnings or the VIIS Login screen after correctly typing in this address, port 443 of your network's firewall may be closed. Contact your network administrator to open this port for outgoing HTTPS, which is secure HTTP.
4. Depending on your browser, you may receive one or more security/certificate warnings before the browser will open the site. Accept any warnings regarding secure connections or security certificates. Both Netscape® and Internet Explorer will give you the option of turning off these warnings for future use.

5. At the VIIS login screen, enter your organization code, username, and password. The information on this screen is case sensitive; enter the information exactly as you received it.



The information on the Login screen is case sensitive; in other words, you need to enter the data in upper- and/or lower-case, exactly how you received it.

6. Press the Login button.
7. The VIIS home page will now display.

Login Menu Items

At the top of the login page, four menu items appear: Home, Forms, and Related Links. By hovering the cursor over one of these menu items, you may access a drop-down menu. To select an item from the drop-down menu, simply click the desired item.

Post Login

Once in VIIS, you may access the post-login page to switch organizations, manage users, or manage your own account. To do this, simply click the Manage Access/Account menu option at the top of the screen in VIIS. The post-login page will display. For more information on the functions available on the post-login page, refer to the Managing My Account and Managing Users and Organizations chapters of this manual

Exiting VIIS

To exit from the VIIS Web site, press the logout button on the VIIS menu bar at the top of the screen. VIIS may be closed this way from any screen within the registry. Once you press the logout button, you will be returned to the VIIS Login screen. You may minimize your browser at this point by pressing in the upper right corner of your computer screen.

If you wish to close your browser completely, you may either press in the upper right hand corner of your computer screen, or you may click on File and then Close on the browser's menu bar. If you do not see the menu bar, your browser may be in Full Screen view; press F11 on your keyboard.

Time Outs in VIIS

For security reasons, your session with VIIS will time out after one hour of inactivity. A message to that effect will be displayed briefly and then the login screen will be displayed. To continue to use VIIS, you will need to log in again.

Optimizing VIIS

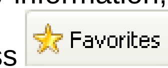
In this chapter:

Creating Favorites and Shortcuts
Optimizing Browser Performance
Running Reports with Acrobat® Reader
Efficient Screen Navigation

Creating Favorites and Shortcuts

To access VIIS quickly, we recommend you set up a shortcut icon for VIIS, set VIIS as a favorite (also known as a bookmark), or set VIIS as your browser's home page.

Adding VIIS to Favorites (Internet Explorer):

1. Click File and choose Open.
2. Type in the VIIS Web address, https://www.viis.vdh.virginia.gov
   Press 
.
3. Accept any security or certificate warnings.
4. Once at the login screen, prior to entering any information, click on Favorites on your browser's menu bar or press 
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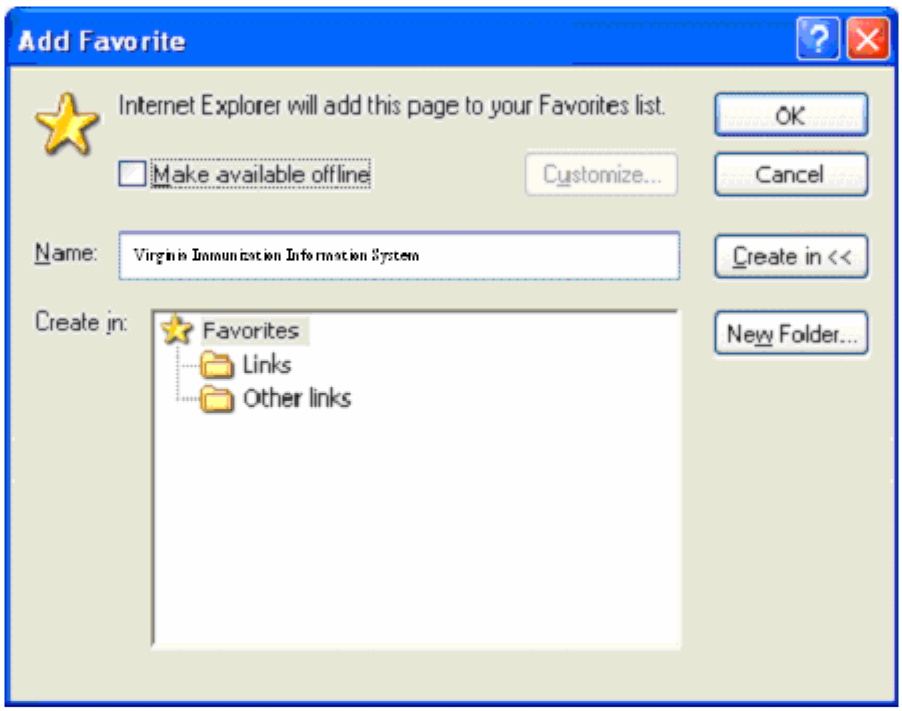
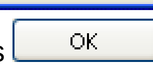


5. Click Add to Favorites and press 
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6. The Virginia Immunization Information System should now appear on your browser's list of favorite sites.

Creating a VIIS Shortcut on Your Desktop (Internet Explorer):

Once you add VIIS as a favorite, you may copy it as a shortcut to your computer's desktop. Once the shortcut is created, simply double-click on it to open your browser to the VIIS login screen. To create a VIIS shortcut:

1. Click on Favorites and right-click on the Virginia Immunization Information System favorite.
2. Click on Send To and then Desktop (create shortcut).
3. Press OK.

If there is no Desktop option under the Send To pop-up menu, do the following:

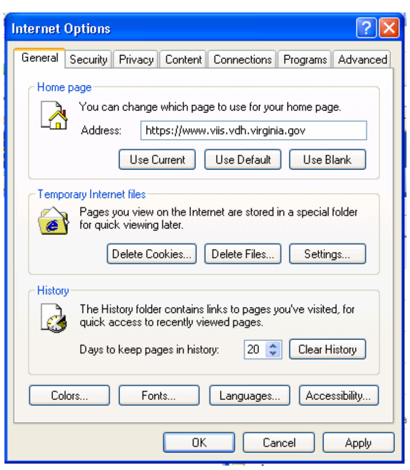
1. After right-clicking on the Virginia Immunization Information System favorite, choose Copy.
2. Minimize the Internet Explorer screen.
3. Choose an open area on your desktop and right-click.
4. Choose Paste Shortcut.

Alternately, you may set a shortcut by doing the following:

1. At the VIIS login screen, before entering any data, choose File from the menu bar.
2. Click on Send and Shortcut to Desktop.

Setting VIIS as Your Browser's Home Page (Internet Explorer):

1. At the VIIS login screen, before entering any data, choose Tools from the menu bar.
2. Click on Internet Options.



3. In the Internet Options box, click on the General tab.
4. On the Home Page section of the box, press Use Current.
5. Press OK.

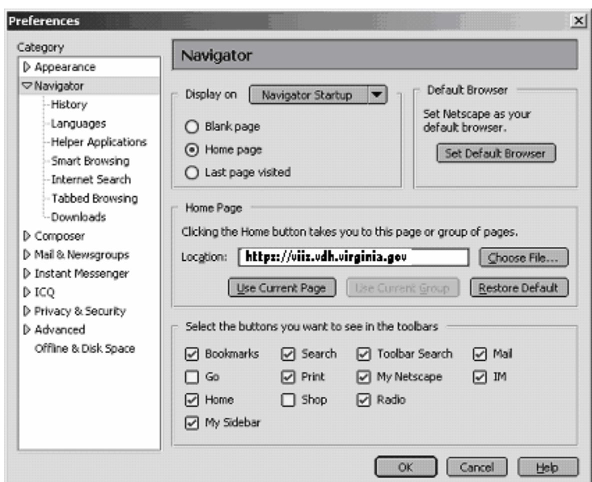
Adding a VIIS Bookmark (Netscape® 4.7):

1. Click File and choose Open Web Location.
2. Type in the VIIS Web address, *https://viis.vdh.virginia.gov.* Press OK.
3. Accept any security or certificate warnings.
4. Once at the login screen, click on Bookmarks on your browser's menu bar. Choose Add Current Page.
5. The Virginia Immunization Information System should now appear on your browser's list of bookmarks.

Setting VIIS as Your Browser's Home Page (Netscape® 6.0):

1. At the VIIS login screen before entering any data, click Edit and choose Preferences.

2. Click the Navigator category.



3. In the Home Page section, press Use Current Page to make the page currently displayed in the browser window your home page.
4. Press OK.

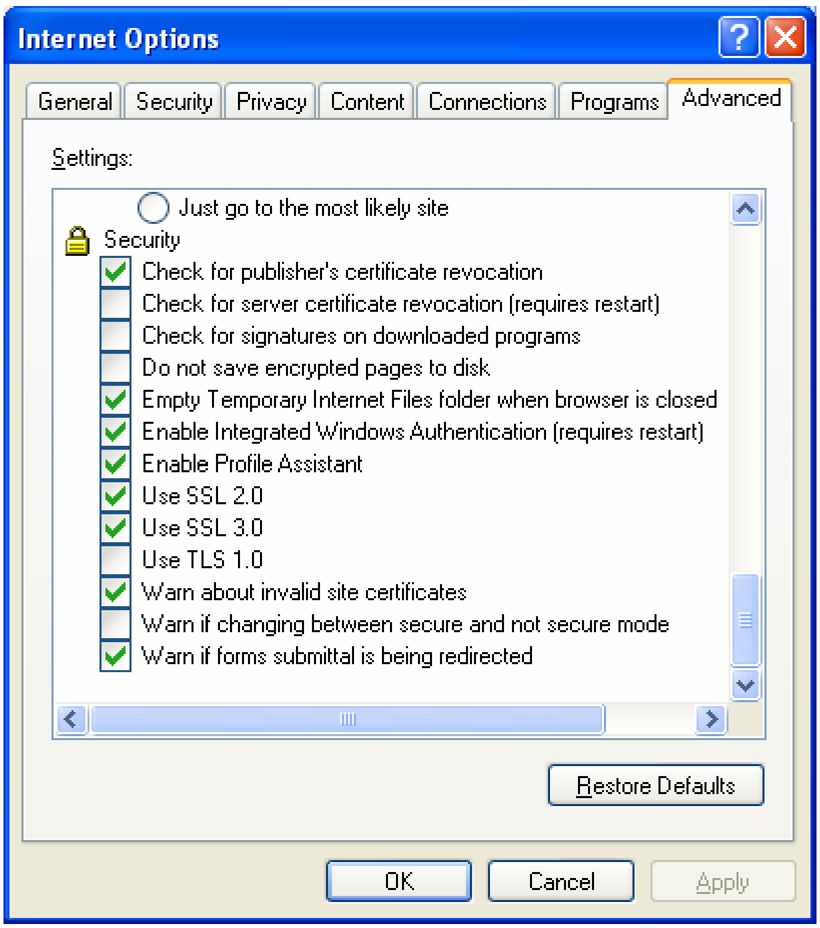
Optimizing Browser Performance

Unless instructed to do otherwise, your browser will automatically save a copy of each new Web page you visit to your computer's hard drive. Over time, these saved files can slow down your browsers performance. To avoid this problem, you may set your browser to automatically delete the temporary Internet files each time the browser is closed.

Deleting Temporary Internet Files (Internet Explorer 6.0)

To automatically delete all temporary Internet Files each time Internet Explorer is closed, follow these steps:

1. Click on Tools on your browser's menu bar.
2. Choose Internet Options.
3. Click on the Advanced tab.



4. Scroll down the list until you see the Security heading.
5. Put a check mark next to the command, "Empty Temporary Internet Files folder when browser is closed."
6. Press 

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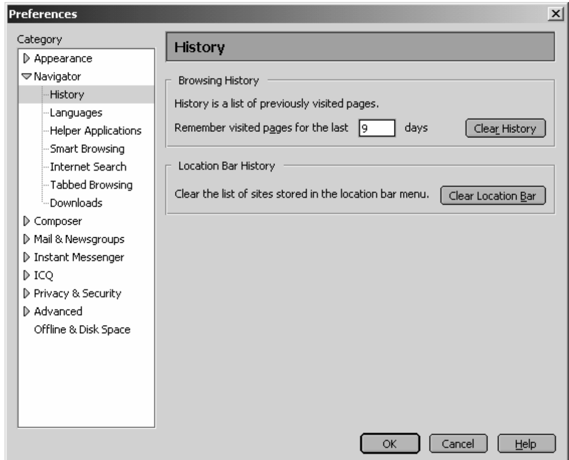
Clearing History Files (Netscape® 6.0)

1. Click Edit and choose Preferences.

2. Under the Navigator category, choose History (if no options are visible in this category, click the arrow to expand the list).



3. Press Clear History and/or Clear Location Bar to remove all previously visited Web pages from the lists.
4. To limit how long pages remain in the History list, click the field next to “Pages in history expire after:” and type in a number of days.
5. Press OK.

Operating in Full-Screen Mode (Internet Explorer)

To view most elements of VIIS with a minimal amount of scrolling, set your browser to full screen mode by pressing F11 on your keyboard. This mode gives you minimal browser commands and maximum viewing area for VIIS screens. To return to normal screen mode, press F11 again.

Running Reports with Adobe Acrobat Reader®

VIIS uses Adobe Acrobat Reader® 6.0 to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Running Acrobat Reader® Files

The first time a report is displayed using Acrobat Reader®, a window may appear asking whether you want to run the file or save the file to disk. Choose “Run the file” and “Do not display this message again.”

If you try to print a report in Acrobat® and find that some of the text is illegible, choose File, Preferences, and General on the Acrobat® menu bar. In the General Preferences dialog box, make sure the "Smooth Text and Images" box is checked.

Problems Running Reports in Acrobat®

If, while using Adobe Acrobat Reader® 6.0, you get a small icon resembling a segmented cube and the report does not display, Acrobat Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Press the Start button on the lower left corner of your computer screen.
2. Click on Programs.
3. Click on Adobe Acrobat® 6.0.
4. Click on Acrobat Reader® 6.0.
5. On the Acrobat Reader® menu bar, click on File.
6. Choose Preferences.
7. Choose General.
8. Under Options, uncheck Web Browser Integration.
9. Press OK.

Try running your report again. If you continue to have problems, contact the VIIS Help Desk at (866)375-9795.

File Transfer Protocol Server Access

When running reports and data downloads, VIIS queries a File Transfer Protocol (FTP) server to read the file. If your network has blocked FTP access for any reason or if FTP wasn't installed with your browser, you will be unable to run reports or download data. Contact your information systems (IS) staff if you suspect your FTP access is blocked.

Efficient Screen Navigation

Microsoft® Windows® often allows users several ways to accomplish certain tasks. Because VIIS runs under Windows®, it also allows users to use these methods to enter data. Learning the shortcuts in this section will help you increase your efficiency when entering data in VIIS, particularly by reducing the number of times you will need to switch from keyboard to mouse. These shortcuts will work in almost all Microsoft® software, not just Internet Explorer.

Keyboard Shortcuts in VIIS

Shortcuts below that are marked with an asterisk (*) behave differently in Netscape® than they do in Internet Explorer. Read the explanation for the shortcut in question for more information.

Deleting data:	When a field or a portion of a field is highlighted, typing something deletes the highlighted information and replaces it with the characters you typed. If you hit the Delete or Backspace key, the highlighted information is deleted. To place the cursor in a specific position within highlighted text, position the cursor where you want it and click the left mouse button once.
Tab*:	The Tab key advances the cursor to the next field. Internet Explorer moves through the fields in the order specified by the Web page. When the cursor reaches the last field, it advances back to the first field on the screen when Tab is pressed. *In Netscape®, the Tab key moves the cursor from left to right, top to bottom, regardless of the tab order specified by the Web page.
Shift+Tab*:	Holding down the Shift key and pressing the Tab key will bring the cursor back to the previous field. In Internet Explorer, the cursor will go back to the previous field defined by the Web page. *In Netscape®, the cursor will go to the previous field as defined by the order described above.
Enter*:	In most cases, the Enter key will complete entry of information on the current screen. Most screens have a default button that is activated when the Enter key is pressed — this button could be called Save, Submit, OK, etc. *Netscape® does not recognize the Enter key.
←(Left Arrow):	The left arrow moves the cursor one character to the left.

→ (Right Arrow):	The right arrow moves the cursor one character to the right.
Ctrl+←:	Holding down the Ctrl key and pressing the left arrow key moves the cursor one word to the left.
Ctrl+→:	Holding down the Ctrl key and pressing the right arrow key moves the cursor one word to the right.
Ctrl+A:	Holding down the Ctrl key and pressing the A key will select all the text in the current field.
Ctrl+C:	Holding down the Ctrl key and pressing the C key will copy all highlighted text in the current field to the clipboard without changing the highlighted field.
Ctrl+V:	Holding down the Ctrl key and pressing the V key will insert ("paste") the contents of the clipboard at the current cursor position.
Ctrl+X:	Holding down the Ctrl key and pressing the X key will cut all highlighted text from the current field and place it on the clipboard.
Delete:	This key deletes the character to the right of the cursor. If the field is highlighted, all highlighted text is deleted.
Backspace:	Backspace deletes the character to the left of the cursor. If the field is highlighted, all highlighted text is deleted.
Home:	The Home key positions the cursor to the left of the first character in the field.
End:	The End key positions the cursor to the right of the last character in the field.
Shift:	Using the Shift key in conjunction with any key affecting cursor position will highlight all characters in the field between the starting cursor position and the ending cursor position. For example, if the cursor is at the end of a field and Shift+Home is typed, the cursor is repositioned to the left of the beginning of the field and the entire field is highlighted.

Ctrl: Using the Ctrl key in conjunction with any key affecting cursor position will move the cursor all the way to either end of the field, or the next space in the indicated direction. Using the Ctrl and Shift keys simultaneously not only moves the cursor, but also highlights all text in the field between the starting cursor position and the ending cursor position.

Space: When the cursor is at a check box, the Space bar toggles the check mark on and off.

Mouse Shortcuts in VIIS

Unless otherwise specified, mouse clicks refer to the left mouse button. Internet Explorer automatically positions the cursor in the field specified by the Web page; Netscape® does not. To position the cursor, click the mouse in the desired field.

Clicking in a field: Clicking in a field will place the cursor in that position.

Double clicking in a field: When a field contains one character string with no spaces, you may highlight the entire field by double clicking anywhere in the field. If the field contains words separated by spaces, double clicking highlights only the word at which the cursor is pointing.

Triple clicking in a field: When a field contains words separated by spaces, the entire field may be highlighted by triple clicking anywhere in the field.

Dragging the mouse: To highlight a field, hold down the left mouse button within a field and drag the mouse across the field.

Right clicking in a field: When you right click in a field, VIIS displays a pop-up menu with various options. If any items are grayed out, there is either no text currently selected or no text is currently on the clipboard. The pop-up menu options are as follows:

Undo: Undo reverses your last action. Undo may be repeated several times.

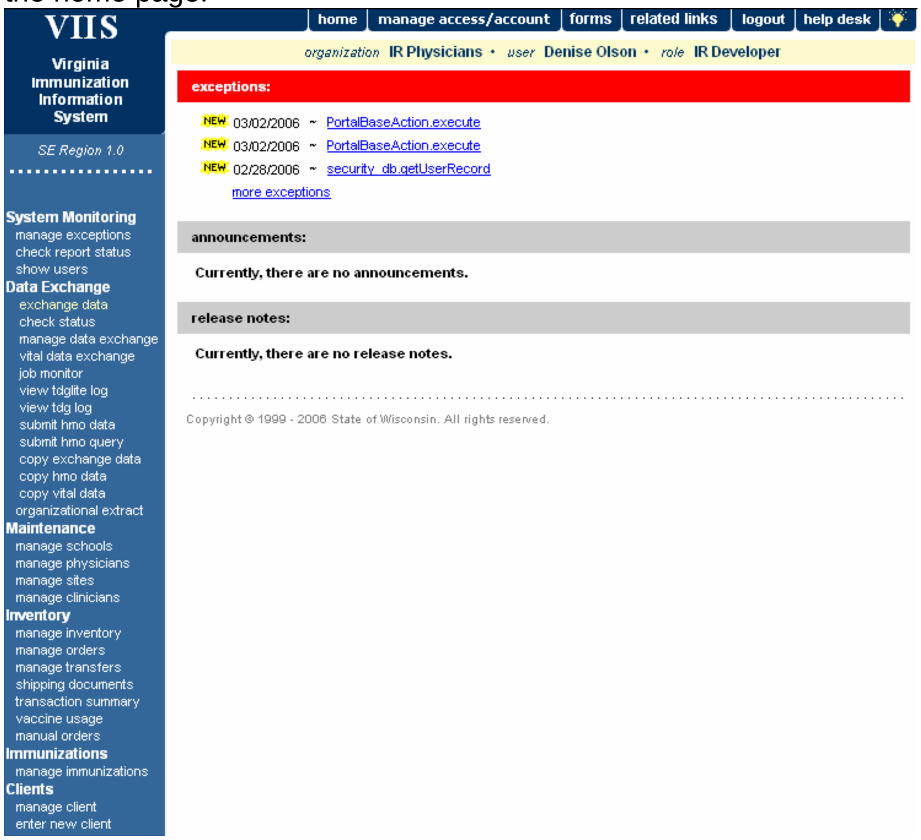
Cut: Cut deletes all highlighted text in the current field and places it on the clipboard.

Copy:	Copy duplicates all highlighted text in the current field on to the clipboard without changing the highlighted field.
Paste:	Paste inserts the contents of the clipboard into the current field.
Delete:	Delete removes the highlighted text without placing it on the clipboard.
Select All:	Select All highlights all text in the current field.

Home Page

In this chapter:

The home page of the VIIS Web site opens after you have provided a valid organization code, username, and password. The home page of VIIS is divided into several sections.   It may be necessary to use the vertical scroll bar to the right of the VIIS screen to view all sections of the home page.



Menu Bar

At the top of the screen toward the right side, you have several menu options. These menu options will appear on every screen within VIIS. The options available are the following:

1. Home: Clicking this menu option will return you to the VIIS home page from anywhere in the registry.
2. Manage Access/Account: Clicking this menu option will bring you to the post-login page, where you may switch organizations, manage your account, or manage access to other accounts. Refer to the Managing Users and Organizations and Managing My Account chapters of this manual for more information on these functions.

3. Logout: Clicking on this menu option will log you out of your current VIIS session and return you to the Login screen. You may logout from any screen within VIIS
4. Help Desk: Clicking on the Help Desk menu option will give you a screen with contact information for the VIIS Help Desk.
5. Online Help: Clicking on the light bulb in the right corner of the screen brings up page-specific help. Refer to the Appendix of this manual for more information on online help.

   Directly below the menu bar is a row of information highlighted in a different color. This row contains your organization's name, your first and last name, and your role within the organization. If any of this information is incorrect, contact your organization administrator.

Menu Panel

The menu panel is color-shaded and appears on the left of all screens within VIIS.

Menu Selections

The menu panel contains links — options that, when clicked; take you to the functions of the VIIS Web site. These links, which include functions under Reports, Immunizations, Clients, Maintenance, and others, are used to navigate the VIIS Web site. Your role will determine your access to these functions.

Announcements

The right hand portion of the home page, which has a white background, contains recent information on enhancements and maintenance relating to VIIS. Recent announcements that have not been viewed will have "New" highlighted in yellow alongside them. Once you have viewed the announcement and returned to the home page, the flag will disappear. To view a full announcement, do the following:

1. Click on the underlined announcement title.
2. The VIIS Announcement screen will display, giving full details and the posting date of the selected title.
3. Click on the Return to Main Page link to return to the home page.

Release Notes

Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of VIIS and features included in the releases. Release notes may be viewed in the same manner as announcements.

Inventory Alerts

The inventory alerts section will appear on the VIIS home page for users with Administrator and Inventory Control levels of access.

The inventory alerts section of the home page consists of two tables. The top table, Active Inventory That is Going to Expire, lists vaccines at each site that will expire within 30 days. The bottom table lists, by site, inventory that is nearly depleted.

Managing Users and Organizations

In this chapter:

The Manage Access function allows users with administrator rights to add and update information on users and organization for which the administrator has access.

Other user roles are able to update only their own user information using the Manage My Account function. See the Managing My Account chapter of this manual for more information on this function.

User Roles

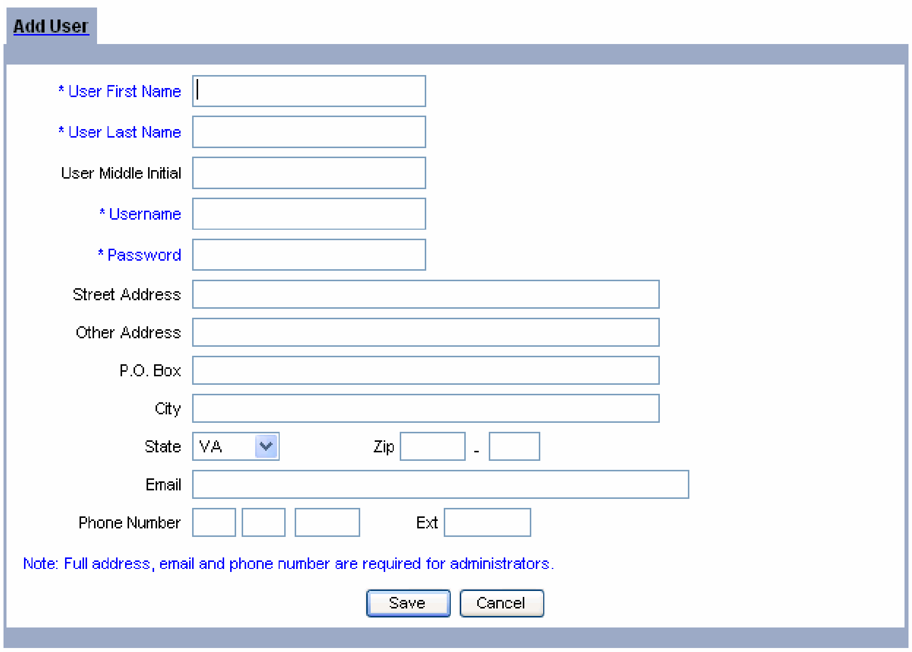
Required fields have asterisks and display in blue type. For example, when entering information on the Add User screen, the user's first and last name are required: thus they have an asterisk and are shown in blue. Input fields not shown in blue are optional.

1. **Administrator:** This is the main contact for VIIS within the health care organization. The administrator is responsible for the maintenance of all organization specific information, including users, sites, and clinicians. The administrator may run reminder/recall reports, Clinic Assessment Software Application (CASA) extracts, and synchronization reports. The administrator also can access the functions available for the following roles.
2. **Inventory Control:** The inventory control user is responsible for managing the organization's inventory of vaccines. This person may use VIIS to view the organization's inventory, add vaccines, update vaccines, and view transactions. The inventory control user has access to the functions available to typical and reports-only users.
3. **Typical User:** This is the primary user of VIIS. The typical user adds, edits, and finds clients, manages immunizations information, and prints immunization reports for clients.
4. **Data Exchange/HMO User:** Data exchange and HMO users will be able to automatically exchange immunization batch files through VIIS. In additions, this user will be able to view client reports.
5. **Reports-Only:** The reports-only user has access to client query information and may print client-specific reports and new client forms. This user may not edit or update information in the registry.

Adding Users

To add a user to VIIS, follow these steps:

1. Access the post-login page clicking the Manage Access/Account menu option at the top of the VIIS screen.
2. Click Add User under the Manage Access section of the menu panel.



3. Enter the following required information for the user:
   - First name, last name, and middle initial (optional).
   - Username. The username should be a minimum of four characters in length and may include mixed –case letters and number.
   - Password. The password should be a minimum of four characters in length and may include mixed-case letters and numbers.
4. Enter additional information if desired, such as the user mailing and e-mail addresses and telephone number. If the user has an administrator or data exchange role, you will be required to enter his or her street address, city state, Zip, e-mail, and telephone number.
5. Press Save.

When choosing user names for the registry, be as specific as possible. This will avoid confusion as users are added over time.

The username and password fields are generally entered with lowercase letters. However, if they are entered in mixed case (upper- and lower case), be user to enter them the same way on the VIIS login screen.

Since there is no password verification on the Add User screen, enter this information carefully. Once the Submit button is pressed, there is no way for an organization administrator to look up the password. If the password was entered incorrectly or the user forgets the password, the organization administrator may go into the Edit User function and reset the password.

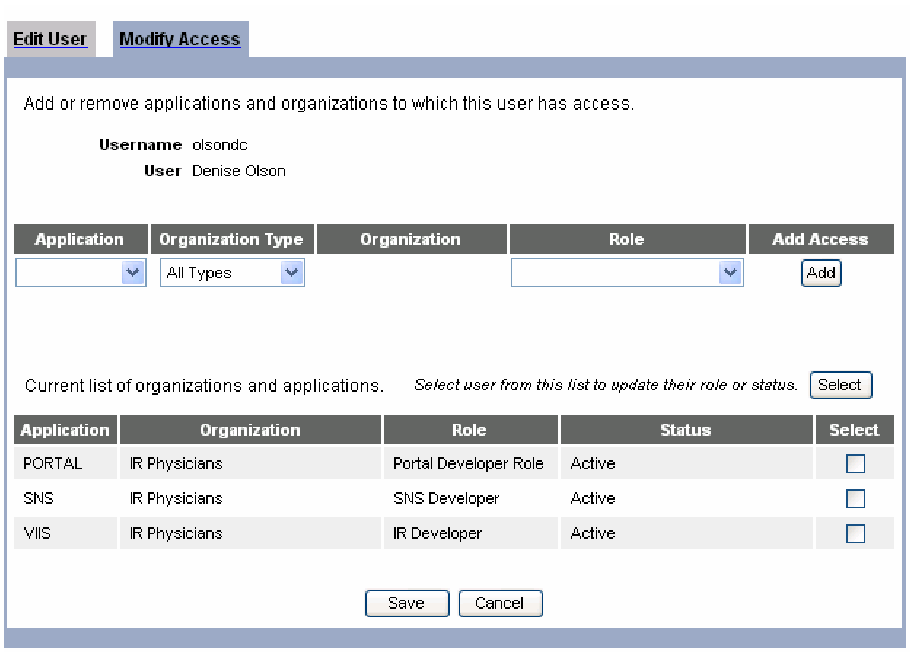
6. Once a user is successfully saved in the database, “user Added, please proceed to the Modify Access Tab. User does not have access until you do “will appear at the top of the Edit User screen.

If a user has access to more than one application and /or organization, he or she will need to select the appropriate application and organization from the pick lists provided.

Modifying Access

After adding a user, you will need to complete the Modify Access screen for the user; the user will not have access to VIIS until you complete this step. To give a user access, follow these steps:

1. At the Edit User screen, click the Modify Access tab.



2. Select the users’ role fro the pick list provided.
3. Press Add to add the information entered for this user.

Press Save when finished entering access information for this user.

Adding Multiple Users

Administrators also have the option of adding multiple users at once to an application and organization. To add multiple users with roles other than administrator, follow these steps:

1. Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.

2. Click Add Multiple Users under the Manage Access section of the menu panel.
3. At the Add Users screen, enter the last name, first name, username, password, and role for the user.
4. Press Add
5. Follow Steps 3 and 4 for each additional user;
6. When finished saving the last user, press Home to return to the post login page.

To find a specific user, enter at least one character for either the first or last name. To display a list of all users within the parameters entered, leave both the first and last name fields blank.

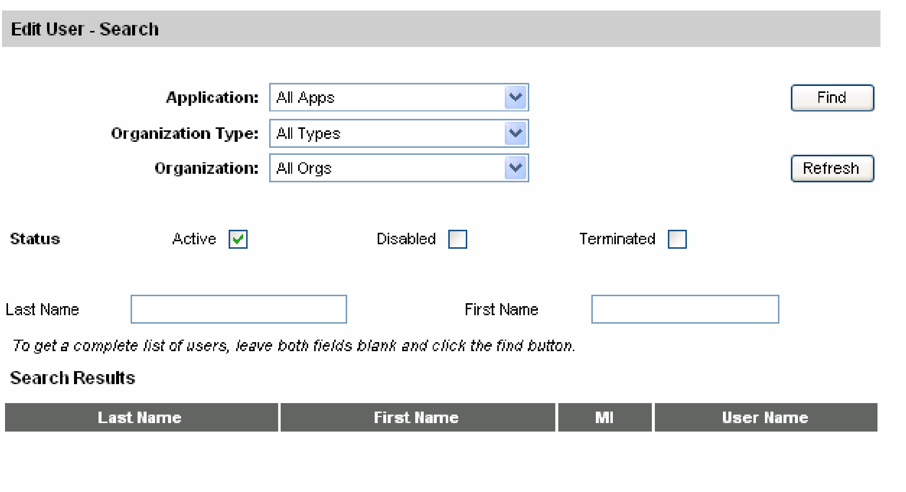
Finding/Viewing Users

VIIS allows administrators to search for individual users by first and last name, or to create a list of all users by organization and application. To search for users within your organization, follow these steps:

1. Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.

2. Click Edit User under the Manage Access section of the menu panel.

If a user has not used VIIS for 60 days or more, VIIS will automatically inactivate that user. To search for a user who has been inactivated, be sure to check the "Disabled" box on the search screen; this will bring up both disabled and inactivated users. You may then change the user' status to active on the Modify Access tab.



3. At the Edit User — Search screen, check the box under Status that indicates whether the user is Active, Disabled, or Terminated. Then enter the last and first name of the user for whom you are searching, or leave both fields blank to bring up a complete list of users matching the search criteria.
4. Press Find
5. All names matching the search criteria will be listed under the Search Results portion of the screen. To display the Edit User

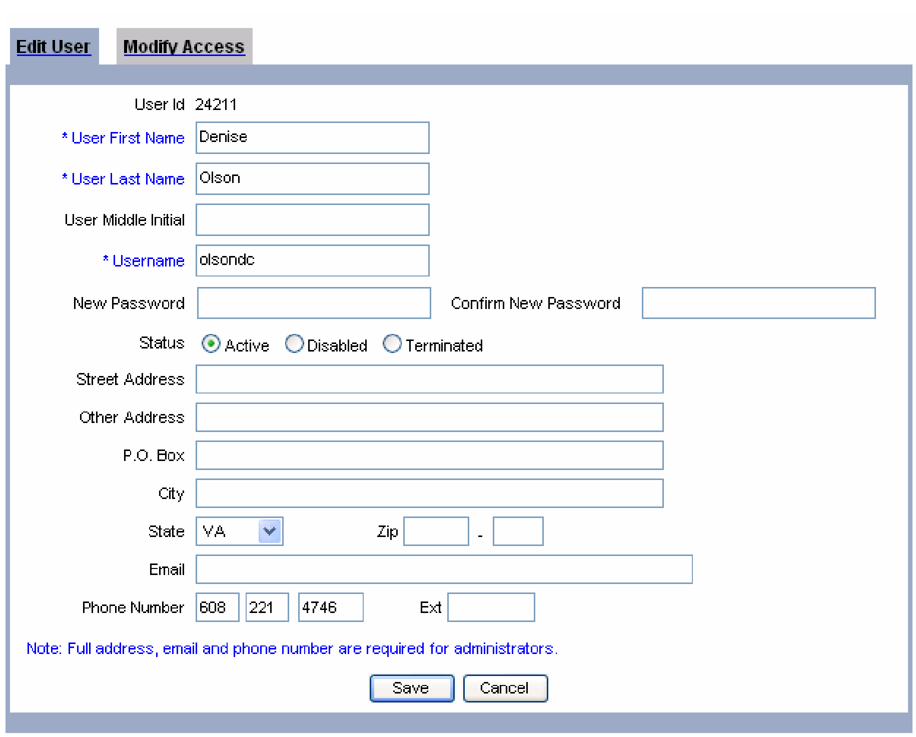
screen for a specific user, click the user' last name.

Maintaining Users

The Edit User function allows you to change any previously entered information about a user, including the initial password and status. To edit user information, follow these steps:

1. Find the user whose information needs updating by following the steps outlined in the Finding/Viewing Users section of this chapter.

2. At the Edit User screen, update the information found on the screen. To reset a user' password, enter a new password and confirm the new password on this screen. To change a user' status, click the appropriate status to indicate that the user is active, disabled, or terminated



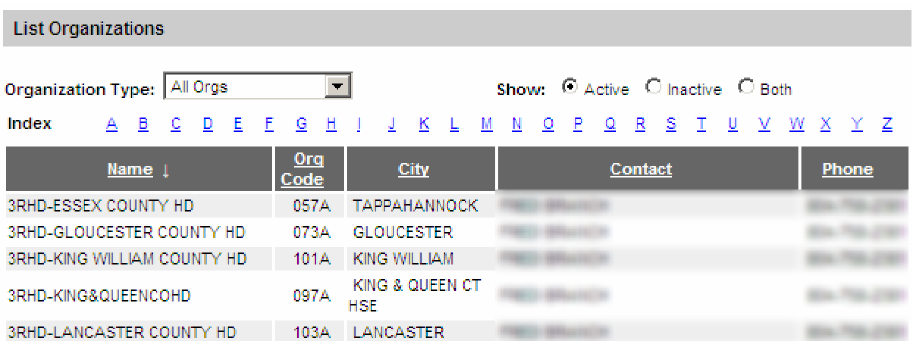
3. Press when you are finished updating the user' information.
4. Once a user is successfully saved in the database, "User Updated" will appear at the top of the Edit User screen.
5. To modify the access of the user, click the Modify access tab.

6. To edit current access, check the Select box for the access to be edited. Press
7. Update the user' role and/or status for the selected access and press
8. Once a user' access is updated, "User Access Updated" will appear at the top of the Modify Access screen.

Viewing Provider Organizations

VIIS allows users with an administrator role to view a list of provider organizations within the database. To view the listing, follow these steps:

1. Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.
2. Click List Organizations under the Manage Access section of the menu panel. The following screen will appear:



3. The list can be sorted for any column by clicking on the column you wish to sort by. The sort order is indicated by an arrow (pointing either up or down) that shows whether the order is ascending or descending. You may also select a letter from the Index menu to view those organizations beginning with the letter selected.

Editing Organizations

Users may also edit information for the organizations for which they have administrator access. To edit this information, follow these steps:

1. Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.
2. Click Edit Organization under the Manage Access section of the menu panel.
3. The list can be sorted for any column by clicking on the column

you wish to sort by. The sort order is indicated by an arrow (pointing either up or down) that shows whether the order is ascending or descending. You may also select a letter from the Index menu to view those organizations beginning with the letter selected.

4. Select the organization you wish to edit by clicking on the underlined organization name. The organization with an asterisk before the name indicates the parent organization and will only display if the administrator has access to it.
5. Enter the updated organization name, county, address information, contact information, or telephone number. The Org ID, Org Classification, Type, Short Name, and Medicaid ID can only be updated by contacting the VIIS Helpdesk.
6. Press Save the message "Organization Updated" will appear at the top of the screen. Any information that is updated is also updated for related sites so that the information remains synchronized.

Managing My Account

In this chapter:

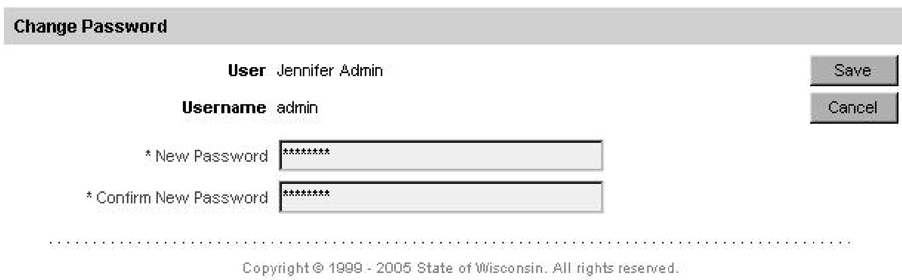
Changing Passwords
Editing User Information

VIIS allows all users to manage their own user information, merge other access accounts, and change their own password.

Changing Passwords

To change your VIIS password, follow these steps:

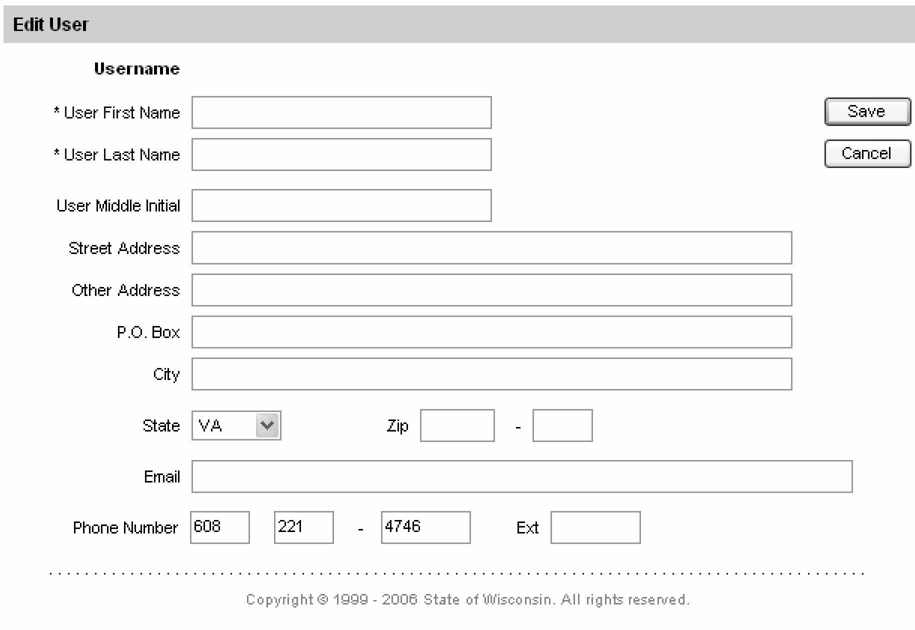
1. Access the post-login page by logging into VIIS.
2. Click Change My Password under the Manage My Account section of the menu panel.



3. Enter a new password with a minimum length of four alphanumeric characters.
4. Re-enter the new password in the Confirm New Password field.
5. Press SAVE the message “Password Updated” appears in red at the top of the screen.

Editing User Information

1. Access the post-login page by logging in to VIIS.
2. Click Edit My User Account under the Manage My Account section of the menu panel.



3. Edit your first or last name in the appropriate fields. You may also enter or edit your middle initial, e-mail address, postal address, or telephone number information in the appropriate fields.

4. Press *Save.* If changes were made, the message “User Updated” appears on the screen.

The first and last name fields on the Edit User screen are required fields. If you are a user withy the role of administrator, the e-mail, street address, and telephone number fields are also required; you may edit these fields, but do not remove the information from them

Maintenance

In this chapter:

The Maintenance section on the menu panel allows users with administrative rights to add and update information on schools, physicians, clinician sites and clinicians.

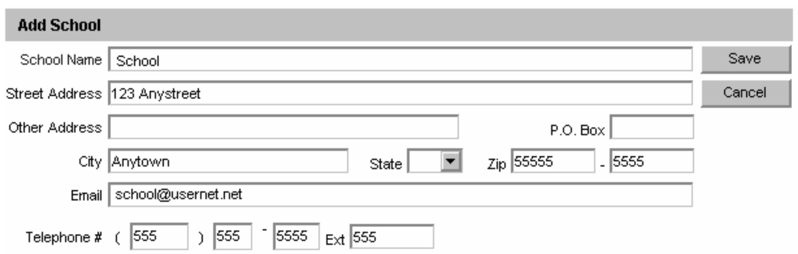
Managing Schools

Administrators may enter new and update existing schools and daycare centers using the Manage Schools function. Schools entered using this function will be available for selection from a pick list on the Manage Client screen. Reports may then be generated by school.

Adding Schools

Required fields are shown in blue type. For example, when entering information on the Add School screen, the School name is required; thus they are shown in blue type. Input fields are not shown in blue are optional.

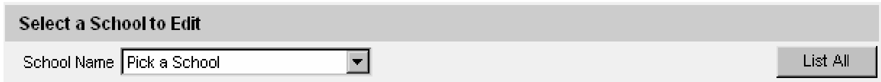
1. Click on Manage Schools under the Maintenance section of the menu panel.
2. On the Manage Schools screen, press Add School.



3. At the Add School box, fill in the name of the school in the School Name text field. Enter any additional information you wish to supply on the school in the appropriate fields.
4. Press Save.
5. Once your school information is successfully saved, “School Added” will appear in the upper right corner of the Edit School box.
6. Press Cancel twice to return to the Manage Schools screen.

Editing School Information

1. Click on Manage Schools under the Maintenance section of the menu panel.
2. On the Manage Schools screen, choose the school whose information you would like to edit from the Select a School to Edit pick list at the top of the screen. Or, click on the school’s name in the School Listing at the bottom of the screen.



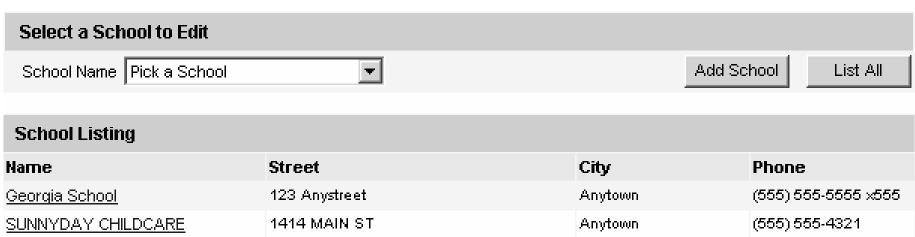
3. Add or change information in the Add School box.
4. Press Save.
5. Once your changes are successfully saved, “School Updated” will appear in the upper right corner of the box.
6. Press Cancel twice to return to the Manage Schools screen.

Deleting Schools

1. Click on Manage Schools under the Maintenance section of the menu panel.
2. On the Manage Schools screen, choose the school whose
information you would like to delete from the Select a School to Edit pick list at the top of the screen.
3. In the Edit School box, press Delete.
4. A box will open asking if you want to delete this school. Press OK.
5. VIIS will return to the Manage Schools screen and the message “School deleted” will appear at the upper right corner of the screen.

Listing All Schools

A list of all schools entered into an organization’s database may be viewed by choosing List All on the Manage Schools screen.



Name	Street	City	Phone
Georgia School	123 Anystreet	Anytown	(555) 555-5555 x555
SUNNYDAY CHILDCARE	1414 MAIN ST	Anytown	(555) 555-4321

Printing All Schools

To print out a list of all the schools in your organization’s database, follow these steps:

1. Click Manage Schools under Maintenance on the menu panel.
2. Press List All in the Select a School to Edit box.

3. Do one of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.
   - Or, press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser's menu bar.
   - In the Print dialog box, press Properties.
   - In the Properties box, find the section where you may specify orientation. Choose landscape.
   - Press OK.
   - Press OK in the Print dialog box.

Required fields are shown in blue type. For example, when entering information on the Add Physician screen, only the physician's last name is required; thus they are shown in blue type. Input fields are not shown in blue are optional.

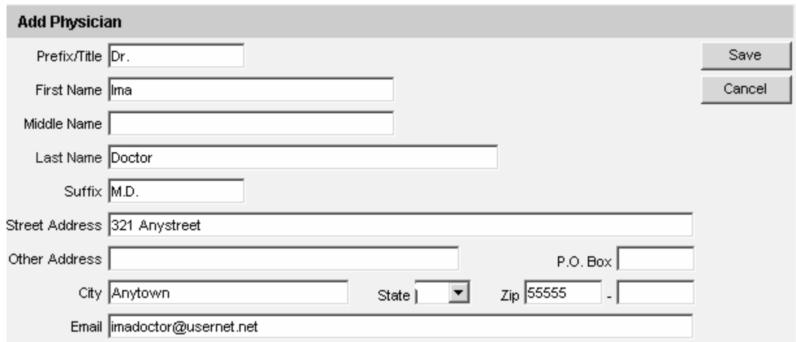
Managing Physicians

Administrators use the Add Physician/Edit Physician screens to enter new and update existing immunization providers. Health care organizations or clinic names may also be entered in the Add Physician screen. Physicians or health care organizations entered on this screen will be available for selection as primary care providers from a pick list on the Manage Client screen. Reports may then be generated from this data.

When entering a physician or health care organization in the Add Physician screen, keep in mind that how you organize this information (by specific doctor, clinic, or both) will be a factor in how you will be able to generate recall and reminder notices for your clients.

Adding Physicians

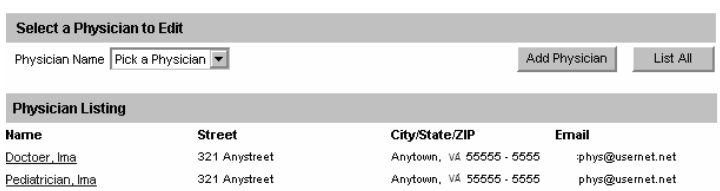
1. Click on Manage Physicians under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, press Add Physician.
3. At the Add Physician box, fill in the required field, Last Name, plus any additional information you wish to supply about the physician. The Prefix/Title field, for example, could be filled with "Dr." and the Suffix field would then be "M.D." To add a clinic name, type the site name in the Last Name field and the location in the First Name field.



4. Press Save.
5. Once the physician is successfully saved, “Physician Added” will appear in the upper right corner of the Edit Physician box.
6. Press Cancel twice to return to the Manage Physicians screen.

Editing Physician Information

1. Click on Manage Physicians under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to edit from the Physician Name pick list at the top of the screen. Or, click on the physician’s name in the Physician Listing at the bottom of the screen.



3. Add or change information in the Edit Physician box.
4. Press Save.
5. Once your changes are successfully saved, “Physician Updated” will appear in the upper right corner of the Edit Physician box.
6. Press Cancel twice to return to the Manage Physicians screen.

Deleting Physicians

1. Click on Manage Physicians under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to delete from the Physician Name pick list at the top of the screen. Or, click on the physician's name in the Physician Listing at the bottom of the screen.
3. In the Edit Physician box, press Delete.
4. A box will open asking if you want to delete this physician. Press OK.
5. Once your changes are successfully saved, "Physician Deleted" will appear in the upper right corner of the Manage Physicians screen.

Listing All Physicians

A list of all physicians entered into an organization's database may be viewed by pressing List All on the Select a Physician to Edit screen.

Printing All Physicians

To print out a list of all the primary care providers in your organization's database, follow these steps:

1. Click Manage Physicians under Maintenance in the menu panel.
2. Press List All in the Select a Physician to Edit box.
3. Do one of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.
   - Or, press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser's menu bar.
   - In the Print dialog box, press Properties.
   - In the Properties box, find the section where you may specify orientation. Choose landscape.

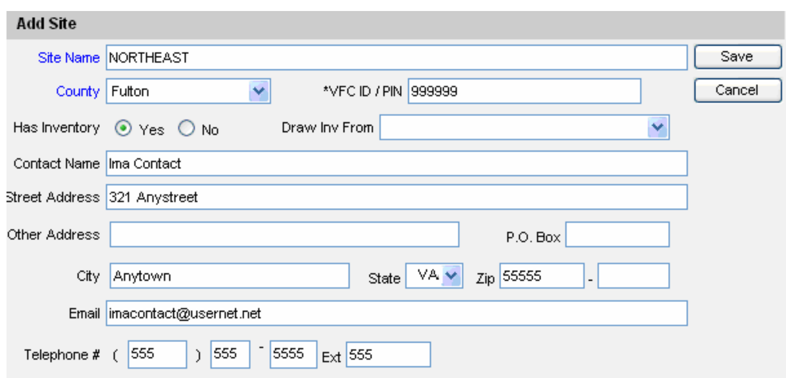
- Press OK.
- Press OK in the Print dialog box.

Managing Sites

Administrators use the Manage Site screens to add new or update existing sites that provide immunizations within their organizations. Once a site is added to VIIS, it is available from several pick lists used for immunization recording and reporting.

Adding Sites

1. Click on Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, press Add Site.



3. Within the Add Sites box, fill in the following information:
   - Enter the site name in the required field.
   - Indicate whether the site maintains its own vaccine inventory or whether it draws inventory from another source by clicking the Yes or No radio button under Has Inventory. If the site draws inventory from another source, choose the source from the Draw Inventory From pick list. All sites with inventory *must* be created prior to setting a site that draws from another.
   - Complete any additional information you wish to supply for the site
4. Press Save.
5. Once your site has been successfully saved, “Site Added” will appear in the upper right corner of the Edit Site box.
6. Press Cancel twice to return to the Manage Sites screen.

Required fields are shown in blue type. For example, when entering information on the Add Site screen, the Site name is required; thus they are shown in blue type. Input fields not shown in blue are optional.

When inventory is drawn from another site, the source site must be selected from a pick list. Therefore, you will need to create all sites that maintain inventory prior to adding sites that draw from those inventories.

It is important to tie sites that draw inventory sources. This way, the registry will be able to keep an accurate count of all vaccines.

Sites that draw inventory from another site are shown indented on site pick lists in VIIS.

Editing Site Information

1. Click on Manage Sites under the Maintenance section of the menu panel.
3. On the Manage Sites screen, choose the site whose information you would like to edit from the Site Name pick list at the top of the screen. Or, click on the site name in the Site Listing at the bottom of the screen.
3. Add or change information on the Add Site box.
4. Press Save.
5. Once your site has been successfully saved, “Site Updated” will appear in the upper right corner of the Edit Site box.
6. Press Cancel twice to return to the Manage Sites screen.

Deleting Sites

1. Click on Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, choose the site whose information you would like to delete from the Site Name pick list at the top of the screen. Or, click on the site name in the Site Listing at the bottom of the screen.
3. In the Add Site box, press Delete.
4. A box will open asking if you want to delete this site. Press OK.
5. VIIS will return to the Manage Sites screen and the message “Site deleted” will appear at the upper right corner of the screen.

Listing All Sites

A list of all sites entered into an organization’s database may be viewed by choosing List All on the Manage Sites screen. This table lists the name of the site, the contact name and telephone number for the site, and whether the site has its own inventory or draws from another site.

Printing All Sites

To print out a list of all sites in your organization, follow these steps:

1. Click Manage Sites under Maintenance on the menu panel.
2. Press List All in the Select a Site to Edit box.

3. Do either of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.
   - Or, press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser's menu bar.
   - In the Print dialog box, press Properties.
   - In the Properties box, find the section where you may specify orientation. Choose landscape.
   - Press OK.
   - Press OK in the Print dialog box.

Managing Clinicians

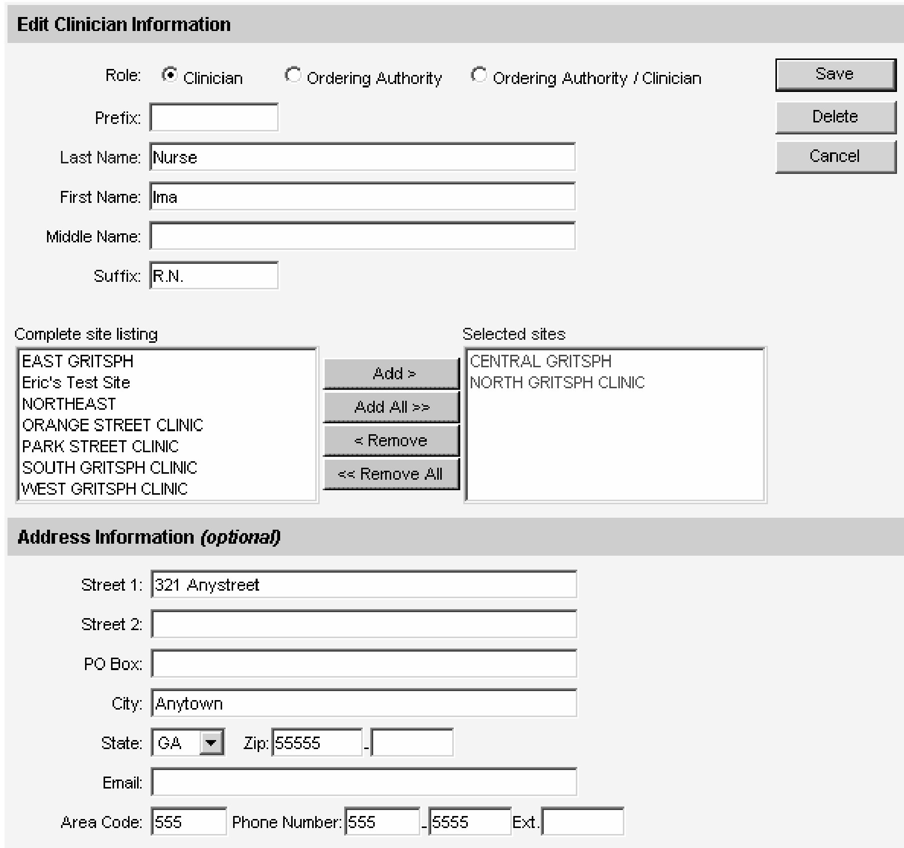
Clinicians are the individuals within the organization who administer and/or approve the administration of vaccines. A clinician may be associated with one or more clinic sites. The organization administrator will use the Manage Clinicians function to enter new and update existing clinicians within the organization. Clinicians added to the registry through this function will be available from pick lists used for recording immunizations.

Adding Clinicians

1. Click on Manage Clinicians under the Maintenance section of the menu panel.
2. Press Add Clinician.

Required fields are shown in blue type. For example, when entering information on the Managing Clinicians screen, the clinician last name is required; thus they are shown in blue type. Input fields are not shown in blue are optional.

When entering clinician site information on the Add Clinician screen, you may move the sites in the field in the middle of the screen from left to right simply by double clicking them.



3. At the Add Clinician Information screen, choose a role for the clinician. Definitions of these roles are as follows:

   Clinician: The clinician is the person who administers the vaccination.

   Ordering Authority: In a public health department, the ordering authority is the medical director. In private practice, the ordering authority is the client's pediatrician or primary care physician.

   Ordering Authority/Clinician: Check this option if the person both authorizes and administers vaccines, such as a pediatrician.

4. Fill in the required field, Last Name, and any other fields you wish to complete. The Prefix field, for example, might be filled with "Dr." and the Suffix field would then be "M.D."

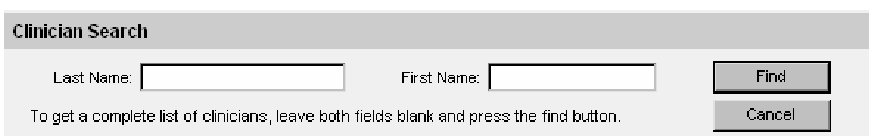
5. In the Complete Site Listing field at the bottom of the screen, highlight a site with which the clinician will be associated and press Add. Do this for each site at which the clinician may practice. If the clinician is associated

with all the sites in the Complete Site Listing, press Add All.

6. Press Save.
7. After the clinician is successfully saved, the message “Inserted clinician: <last name>, <first name>” will appear at the bottom of the screen.
8. Press Cancel to return to the Manage Clinicians screen, .

Editing Clinician Information

1. Click on Manage Clinicians under the Maintenance section of the menu panel.
2. Press Find Clinician. Or, choose a health care site from the Site List and click on the appropriate clinician name on the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.
3. At the Clinician Search screen, enter the last and first names of the clinician and press Find to bring up his or her information. Then click on his or her last name in the Search Results table. Or, leave both fields blank and press Find to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.



4. Make the desired changes or updates to the clinician’s information.
5. Press Save.
6. Once the clinician’s information is successfully updated, the message “Updated clinician: “<last name>, <first name>” will appear at the bottom of the screen.
7. To return to the Manage Clinicians screen, press Cancel.

Deleting Clinicians

1. Click on Manage Clinicians under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, choose a health care site from the Site List.

3. Press Find Clinician. Or, click on the appropriate clinician name in the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 5.
4. At the Clinician Search screen, enter the first and last name of the clinician and press Find to bring up his or her information. Then click on his or her last name in the Search Results table. Or, leave both fields blank and press Find to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.
5. At the Edit Clinician Information screen, press Delete.
6. A box will open asking if you want to delete this clinician. Press OK.
7. VIIS will return you to the Manage Clinicians screen.

Listing All Clinicians

1. Click on Manage Clinicians under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, press Clinician List.
3. The Clinician Listing screen will open, showing all available clinicians, their site association(s), and their role(s).
4. Press Close to return to the Manage Clinicians screen.

Printing All Clinicians

To print out a list of all the clinicians in your organization's database, follow these steps:

1. Click Manage Clinicians under Maintenance in the menu panel.
2. Press Clinician List at the Manage Clinicians screen.
3. Do one of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.
   - Or, press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser's menu bar.

- In the Print dialog box, press Properties.
- In the Properties box, find the section where you may specify orientation. Choose landscape.
- Press OK.
- Press OK in the Print dialog box.

Managing Inventory

In this chapter:

The red type in the View Inventory screen indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons; the inventory for that vaccine's lot number may be used up,, the vaccines in that lot may be expired, or the vaccines in that lot may have been recalled.

Vaccines on the View Inventory screen that are highlighted in pink will expire within 30 days.

The inventory management function of VIIS is used to view, add, or update any vaccine in an organization's inventory.   This function is designed to be a complete tracking system for a provider's vaccine inventory.

Inventory Alerts

The Inventory Alerts screen is displayed when you click on Manage Inventory under Inventory on the menu panel. The top table on this screen, Vaccine Order/Transfer Notification, updates you on the status of vaccine orders and transfers. The next table, Active Inventory That is Going to Expire, lists vaccines at each site that will expire within 30 days.

The bottom tables on the same screen list, by vaccine group and trade name, inventory that is nearly depleted.

Updating Inventory Alert Preferences

To change system options for expiration alerts and low inventory alerts, follow these steps:

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press 

.
3. In the Inventory Expiration Alerts section, enter the number of days prior to the expiration of the vaccine lot within which you wish to be notified.
4. To enter a low-level alert for all vaccine groups or trade names, select whether you wish to update the low-level alerts by trade name or by vaccine group in the Update Low-Level Alert Defaults section. Then enter the number of doses at which VIIS will indicate that the inventory is running low.
5. To update VIIS's low-level alerts for each vaccine group, enter the number of doses that will indicate that the inventory is running low for each vaccine group listed. You may enter the number in either the combined column (indicating for both public and private sources), the public column, or the private column.
6. To update VIIS's low-level alerts for each vaccine trade name, do the following:
   - Click on the desired vaccine group name, which appears underlined and in blue.
   - Enter the number of doses that will indicate that the inventory is running low for each trade name listed on the Update Low-Level

Alerts by Trade Name screen. You may enter the number in either the combined column (indicating for both public and private sources), the public column, or the private column.

- Press Save.

7. Press Save. If the new preferences were saved successfully, the message "Updated Alert Preferences" will appear at the top of the screen.
8. To restore all inventory alerts to VIIS system defaults, press ***Reset to Default***. Press OK.
9. To return to the Manage Inventory screen, press ***cancel.***

Viewing Inventory

To view the vaccine inventory at a particular site, follow these steps:

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Inventory.
3. The inventory table shown by default will include vaccines from one site within the organization and will include non-expired active and inactive vaccines. Following is a description of all options available:
    - Active: Select the 'Active' option to view only those vaccine lots that have valid (non-expired) doses remaining in the site's inventory.
    - Inactive: Select the 'Inactive' option to view only those vaccine lots that have either no remaining doses or have expired.
    - Non-Expired: Select the 'Non-Expired' option to view any active or inactive inventory that has not yet expired.
    - Expired: Select the 'Expired' option to view any inventory that has expired.

   To view inventory at a different site, view active or inactive vaccines only, or view expired vaccines:

    - Select the site name from the Site pick list.
    - If desired, choose Active or Inactive by clicking on the appropriate radio button.
    - If desired, choose Expired by clicking the appropriate radio button.

Site: Bucky's East Side   Show ◉ Active ○ Inactive ○ Non-Expired ○ Expired

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
☐	Engerix-B	rjgbg311	0	Y	N	06/07/2002
☐	Engerix-B	engpeds3345	50	Y	Y	12/11/2003
☐	Flu-Imune > 3 Years	31169bg	100	Y	Y	03/16/2003
☐	HepB-Dialysis	69bg311	99	Y	Y	04/22/2003
☐	MMR II	23568	45	Y	Y	05/19/2002
☐	MMRV	r3j1g1	100	Y	N	07/26/2003
☐	Prevnar	rjgtttxx	300	Y	N	09/13/2002
☐	RotaShield	78765	100	Y	N	12/28/2003
☐	Td	bg63119bg	149	Y	N	12/25/2002
☐	Typhoid	bg69rjg311	176	Y	N	11/22/2002
☐	VAQTA-Peds 2 Dose	rrjjgg311	119	Y	Y	07/16/2003
☐	Varivax	aabbc	50	Y	N	03/04/2003

Highlighted rows are set to expire soon...

The following is an explanation of the columns in the inventory table:

Select:	A mark in this checkbox allows you to modify the quantity of the selected vaccine.
Trade Name:	This column lists the vaccine's trade name.
Lot Number:	This column lists the lot number of the vaccine.
Doses On Hand:	This column lists the number of doses remaining in the site's inventory.
Active:	A "Y" in this column indicates the inventory is active (available for use). An "N" indicates the vaccine is inactive (unavailable for use because either the vaccine lot does not have any doses remaining in inventory, the vaccine lot has expired or the vaccine lot was set to inactive by a user). Inactive vaccines are shown in red type.
Public:	A "Y" in this column indicates the vaccine was state-supplied. An "N" indicates that the vaccine was privately purchased.
Exp Date:	This column gives the vaccine's expiration date. Vaccines that will expire in thirty days or less are highlighted in pink.

Printing Inventory

To print out a list of inventory at a particular site, follow these steps:

1. Follow Steps 1-3 under *Viewing Inventory*.
2. Click anywhere on the page.
3. Do one of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.

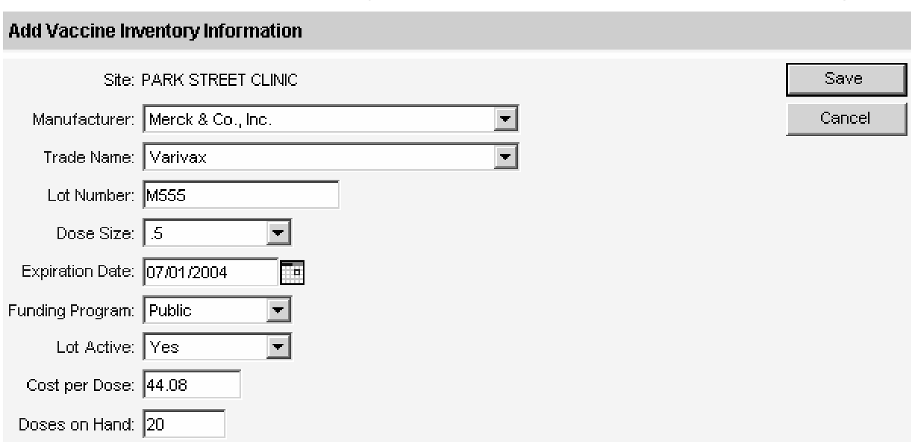
- Or press the printer icon on your browser's toolbar.

4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser's menu bar.
   - In the Print dialog box, press Properties.
   - In the Properties box, find the section where you may specify orientation. Choose landscape.
   - Press OK.
   - Press OK in the Print dialog box.

Adding New Inventory

Use the Add Vaccine function only if you are adding a vaccine with a *new* lot number. If you are adding a vaccine with a lot number that already exists in your inventory, refer to *Updating Inventory*.

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Inventory.
3. At the next screen, choose the site to which you will be adding inventory from the Site pick list.
4. Press Add Inventory.
5. At the Add Vaccine Inventory Information screen, do the following:



   - Verify that the site at which the inventory will be located is listed under Site.
   - Choose the vaccine's trade name from the pick list provided. By selecting the radio button next to the trade name pick list rather than by the manufacturer pick list, all possible trade names will populate the list. Once you have selected a trade

name, the manufacturer pick list will be populated with only those manufacturers that make the selected trade name.

- Choose the vaccine's manufacturer from the pick list provided. By selecting the radio button next to the manufacturer pick list rather than by the trade name pick list, all possible manufacturer name will populate the list. Once you have a selected a manufacturer, the trade name pick list will be populated with only those trade names made by the selected manufacturer.
- Enter the lot number of the vaccine in the Lot Number text box.
- Choose the dose from the Dose Size pick list; choose .25, .5 or 1 ml.
- Enter the vaccine lot's expiration date. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press OK. If no day is specified on the vaccine, enter the last day of the month.
- Choose the source of funding (public or private) used for the purchase of the vaccine from the pick list.
- Choose Yes from the Lot Active pick list. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on pick lists.
- Enter the number of vaccine doses received in the Quantity on Hand text box.
- Enter the cost per dose of the vaccine, if desired, in the Cost Per Dose Field.

6. Press Save.
7. If the new vaccine was saved successfully, the message "Inventory was inserted successfully" will appear at the bottom of the screen.
8. To add additional vaccines, press Add New.
9. To return to the Show Inventory screen, press Cancel.

Updating Inventory

To change information on existing vaccines, follow these steps:

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Inventory.

3. The inventory table shown by default will include active vaccines from one site within the organization. Following is a description of inventory options available:
   - Active: Select the ‘Active’ option to view only those vaccine lots that have valid (non-expired) doses remaining in the site’s inventory.
   - Inactive: Select the ‘Inactive’ option to view only those vaccine lots that have either no remaining doses or have expired.
   - Non-Expired: Select the ‘Non-Expired’ option to view any active or inactive inventory that has not yet expired.
   - Expired: Select the ‘Expired’ option to view any inventory that has expired

   To view inventory for a different site and/or inactive vaccines only:
   - Select the site name from the Site pick list.
   - If desired, choose Active or Inactive by clicking on the appropriate radio button.
   - If desired, choose Expired by clicking the appropriate radio button.
4. Once the appropriate site's inventory displays, select the vaccine lot you wish to update by clicking on the vaccine's trade name, which is underlined and in blue.
5. On the next screen, make desired changes to the Manufacturer, Trade Name, Lot Number, Dose, Expiration Date, Funding Program, Lot Active, or Cost Per Dose fields for each vaccine lot. These fields may be edited only if the vaccine has not yet been administered.
6. To modify the quantity of doses on hand, enter the following information:

   - Under Action, choose whether you would like to add to or subtract from the inventory on hand.
   - Under Amount, enter the quantity of inventory to be added or subtracted.
   - Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason pick list.

Reasons for adding or subtracting inventory:

Receipt of inventory: Use this reason when you are adding new inventory to a particular lot.
Error correction: Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.
Doses *returned:* Use this reason when adding inventory to a particular lot because vaccines were returned from another site.
Doses *transferred:* Use this reason when subtracting inventory that's been transferred to another site.
Doses wasted: Use this reason when inventory is subtracted because of broken vials, faulty injections, etc.

7. Press Save.
8. Once your updates are saved to the registry's database, the message "Inventory was updated successfully" will appear at the bottom of the screen.
9. Press Cancel to return to the Show Inventory screen.

Deleting Vaccine Lots

Vaccine lots may only be deleted if there are no immunizations, pending transfers, or transactions attached to the lot. To delete an entire vaccine lot from inventory, follow these steps:

1. Follow Steps 1-4 under Updating Inventory.
2. To delete the entire vaccine lot, press Delete
3. Press OK

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots, follow these steps:

1. Follow Steps 1-3 under Updating Inventory.
2. Once the appropriate site's inventory displays, put a check mark next to the vaccine lots whose quantities you want to modify.
3. Press Modify Quantity.
4. On the Modify Doses on Hand screen, enter the following information:

- Under Action, choose whether you would like to add to or subtract from the inventory on hand.
- Under Amount, enter the quantity of inventory to be added or subtracted.
- Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason pick list. Refer to the list on the previous page for a description of the reasons for adding or subtracting inventory.
- Press Save.

Viewing Inventory Transactions

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Transactions.
3. At the Vaccine Transactions screen, do the following:

- Enter the From and To dates for when the immunizations were entered in VIIS.
- Or, enter the From and To dates for when the immunizations were given.
- Choose a specific user name or All User Names from the User Name pick list.
- Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason pick list on the Edit Vaccine Inventory Information screen.

Transaction types:
Receipt of Inventory (REC): This type indicates vaccines were added as new inventory.
Immunization Given (Immunize): This type indicates vaccines were subtracted from inventory because of immunizations given.
Immunization Deleted (Delete): This type indicates vaccines were added to inventory because they were deleted from a client's record.
Doses Transferred (TRA): This type indicates vaccines were subtracted due to transfer to another site or organization.
Doses Wasted (WAS): This type indicates vaccines were subtracted from inventory because they were wasted through faulty injections, broken vials, improper refrigeration, etc.
Doses *Returned (RET):* This type indicates vaccines were added to inventory after being returned from another site or organization.
Error Correction (ERR): This type indicates vaccines were added or subtracted to correct a previous error or after getting extra or fewer doses from a vial.

- Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.
- Choose the trade name, lot number, public/private, and site from the Trade Name/Lot Number pick list or choose All Lot Numbers from the list.
- Enter the quantity of records you wish to view in the Display Last <#> Records field.

4. Press ***VIEW***
5. The Vaccine Transactions screen will then display.

Vaccine transactions

The top chart on the Vaccine Transactions screen gives the following information:

Site Name:	Vaccines in the table are first sorted alphabetically by site name
Trans Date:	Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.
Lot/Trade Name:	The lot number and trade name of the vaccine are listed in this column.
Type:	Refer to transaction types in this chapter for an explanation of the transaction codes shown n this column.
Qty:	The number in this column indicates the quantity added to or subtracted from inventory due to the listed transaction.
Client Name:	the client name column indicates the client associated with the transaction, if applicable.
DOB:	The date of birth of the client is indicated in this column, if applicable.

Transaction totals

The chart at the bottom of the Vaccine Transactions screen gives a breakdown of transactions by transaction type.

Trans Code:	This column displays the abbreviated code that identifies the transaction type.
Trans Description:	This column displays the full transaction type.
Trans Count:	This column represents the number of times a particular transaction type was performed within the dates you specified. For example, if your organization received two lots of vaccines within the one-week period for time you specified, the Trans Count would show “2” in the Receipt of Inventory row.

Trans Value: This column shows the quantity of doses added or subtracted by transaction type. For example, if you received a combined 103 doses in the two vaccine lots you added inventory, “103” would show in the Trans Values column on the Receipt of Inventory row.

Printing Inventory Transactions

To print out a list of vaccine transactions, follow these steps:

1. Follow Steps 1 -4 under *Viewing Inventory Transactions.*
2. Click anywhere on the page.
3. Do one of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.
   - Or, press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser's menu bar.
   - In the Print dialog box, press Properties.
   - In the Properties box, find the section where you may specify orientation. Choose landscape.
   - Press OK.
   - Press OK in the Print dialog box.

Creating Transfers

VIIS allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. Press New Transfer.
3. Enter the following information:
   - The sending site from which you will be taking the vaccine.
   - The internal receiving site or the external receiving organization to which you are transferring the vaccine.
   - Choose between active/no expired or inactive/expired vaccines by clicking the appropriate radio button.
   - The number of doses in the Transfer Quantity field for each of the trade names being transferred.
4. Press ***Save.***
5. Press Packing List or Label, if desired. Press Ship when ready to ship the

vaccines. Either use today's date or enters an alternate date in MMDDYYYY format. Press Ship. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.

6. To complete an internal transfer without printing shipping documents, press Finish Trans. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site's inventory and deducted from the sending site's inventory.

Shipping Documents

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see Creating Transfers in this chapter), or by using the following feature:

1. Click on Shipping Documents under the Inventory section of the menu panel.
2. Press Packing List or Label. Print labels and/or packing list, if desired.
3. Enter a ship date if different from today's date, using MMDDYYYY format.
4. Press Ship. Press OK.

Accepting or Rejecting Shipments

Orders and transfers made through VIIS and received by the provider organization must be accepted, rejected, or partially accepted so that VIIS can post and track inventory properly. To accept or reject an order or transfer in VIIS, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. The Manage Transfer screen categorizes transfers as follows:
   - Outbound Transfer: Displays transfers that are outbound from your organization.
   - Inbound Transfer: Displays transfers that are inbound to your organization.
   - Historic Transfer: Displays completed transfers.

To view the actual order sent to the VDH, click the blue, underlined "Order" Under Type of Transfer.

3. To proceed to the Receive Transfers screen (on which you may accept or reject orders and transfers), click on the date underlined in blue in the Create Date column which corresponds with the transfer you wish to receive.
4. At the Receive Transfer screen, you may accept the entire transfer, Reject the entire transfer, or partially accept some of the transfer, while rejecting the remainder.

Accept transfer:	To accept the entire transfer, press Accept Transfer |, Press OK to accept the transfer and add all transfer items into inventory.
Reject Transfer:	To reject the entire transfer, press Reject Transfer. Select a reason for the rejection: Damaged, Not Wanted, Wrong Vaccine, or Never Received. After selecting a reason, press Reject. Press OK to continue with the rejection and be returned to the Manage Transfers screen.
Partially Accept:	To accept part of the shipment, press Partially Accept. At the Partially Accept Transfer screen, select the amount of the vaccines you wish to accept and a refection reason for those you wish to reflect. Press Save.

Shipping and Restocking Transfers

When an order or transfer has been rejected with a reason code of Not Wanted, Wrong Vaccine, or Never Received, it is necessary to ship and restock transfers in the system so that they are correctly reported in inventory.

Shipping Back a Rejected Transfer

If you are the receiving site of a transfer or order that you reject, you must ship the rejected quantities back to the original sender. To do this, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. Click on the appropriate transfer date, underlined and in blue, under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer screen by entering the date in MMDDYYYY format. Press Ship.

Accepting a Rejected Transfer

If you are the original sender of a transfer or order, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. Click on the transfer date of the rejected transfer, underlined and in blue, under the Create Date column.
3. Press Save at the Restock Rejected Transfer screen. The Manage Transfer screen will display, and the transfer will be added to the Historical section of the screen.

Vaccine Usage Reports

The Vaccine Usage Report will give you information on how many doses of each vaccine have been given, by age, within a specified date range. To generate a vaccine usage report for one site or all sites in your organization, follow these steps:

1. Click on Request Vaccine Usage under the Inventory section of the menu panel.
2. At the Vaccine Usage screen, choose a site from the pick list or choose All Sites Combined.
3. In the From field under Report Date Range, choose a starting date for your report using the MMDDYYYY format.
4. In the To field under Report Date Range, choose an ending date for your report using the MMDDYYYY format.
5. Press Generate Report.
6. Press Refresh after a few moments to check the status of your report.
7. Click on the name of your report once it is underlined and displays in blue type.
8. The report displays in Adobe Acrobat Reader®.
9. To print the report, press the printer icon on the Adobe®toolbar.
10. Press OK in the Print dialog box.
11. To return to the Vaccine Usage screen, press the Back button on your browser.

Transaction Summary Reports

The Transaction Summary Report will give you information on how many doses of each vaccine have been given within a specified date range. The report also gives information on how many doses were expired, transferred, received, restocked, wasted, or given in error. To generate a transaction summary report for one site or all sites in your organization, follow these steps:

1. Click on Request Transaction Sum under the inventory section of the menu panel.
2. At the Transaction Summary Report Criteria screen, choose a site from the pick list or choose All Sites Combined
3. In the From field under Report Date Range, choose a starting date for your report using the MMDDYYYY format.
4. In the To filed under Report Date Range, choose an ending date for your report using the MM/DD/YYYY format.
5. Press GENERATE REPORT.
6. The report displays in Adobe Acrobat Reader®
7. To print the report, press the printer icon on the Adobe® toolbar.
8. Press OK in the Print Dialog box.
9. To return to the Transaction Summary screen, press the BACK button on your browser.

Managing Clients

In this chapter:

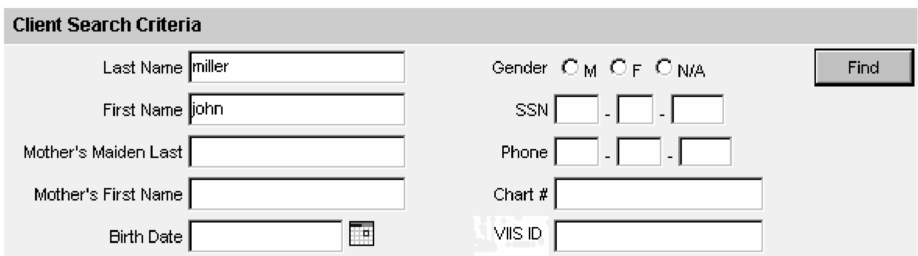
Finding Clients
Use of Pick Lists in VIIS
Editing/Entering Client Information
Saving Client Information
Deduplication of Clients
Opting-Out/Opting-In Clients

Because VIIS receives birth record downloads, you should attempt to find a client in VIIS before entering him or her as a new client. However, VIIS will attempt to deduplicate (compare entered information against information saved to the registry for duplicate clients) client records prior to saving the information on the Enter New Client screen.

Finding Clients

When searching for an existing client in VIIS, more information is not always better. By entering too much information about a client (mother's maiden name, social security number, phone number, birth date, etc.) you will increase your entry time and decrease the odds of finding the client due to typing and interpretation errors. We recommend that you supply four characters of the client's last name and three characters of the first name only, unless the client's name is very common, in which case supplying a complete name, birth date, or mother's maiden name will help narrow the search.

1. Click on Manage Client under the Clients section of the menu panel.



2. In the Client Search Criteria box, you have several options for finding your client.

- Last Name: Entering the first three letters of the client's last name, along with the first two letters of the first name, will initiate a search of all clients matching those letters. Entering fewer than three letters in the last name field will result in an exact name search; for example, entering the letters "Li" will produce only last names of "Li." If the client's name is common, typing in the full name will narrow the search.
- First Name: Entering the first two letters of the client's first name, along with the first three letters of the last name, will initiate a search of all clients matching those letters. If the client's name is common, typing in the full name will narrow the search.
- Mother's Maiden Last: Entering the mother's maiden last name, in combination with the data entered in the above two fields, will narrow a search for a client with a common name. Alternately,

Manage Client vs. Manage Immunizations
Manage Client and Manage Immunizations are the same query; in other words, they both utilize the client search function. The difference is that the Manage Client query will display the Manage Client screen, which consists of the client's demographic information, responsible person(s), etc., while the Manage Immunizations query will display the client's Immunization History screen.

Entering Names
On all first and last names entered into VIIS for client searches, VIIS disregards spaces, apostrophes, and hyphens entered. This is because names in the VIIS database do not include these characters.

you may find all clients associated with a mother by entering only the mother's first name and maiden last name.

- Mother's Maiden First: Entering the mother's first name, in combination with the data entered in the above three fields, will narrow a search for a client with a common last name. Alternately, you may find all clients associated with a mother by entering only the mother's maiden first and last names.
- Birth Date: Entering the client's birth date in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter a date in this field.
- Gender: Indicating the gender of the client will narrow a search for a common name, especially if the first name is androgynous.
- SSN: Entering the Social Security number (SSN) only will produce a single name match. Note: To find a client using his or her social security number, the number must have been entered previously for the client.
- Phone: Entering the client's phone number only will produce a single name match. However, this method is not recommended, as a phone number may not be entered for a client and phone numbers may change over time.
- Chart #: Entering the client's chart number only will produce a single name match. Note: To find a client using this method, the chart number must have been entered previously for the client.

▪ Registry: Changing the designation in this field allows you to query another state's immunization registry. Refer to the Querying Other Registries chapter of this manual for more information.

3. Press Find.
4. If multiple records are found matching the information you entered, a table listing up to 75 matches with detailed information on each will be shown below the Find Client Information box. To choose a client from this list, click on the client's last name, underlined and in blue.

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
MILLER	JOHN	02/20/1993		JOY	DEPAS	M	
MILLER	JOHN	10/01/2001		BETSY	MILLER	U	555-5555

5. If only one client matches your search, the Manage Client screen for that individual will display automatically.

Social Security Numbers

If you attempt to enter a new client or edit an existing client using a SSN that is already stored in VIIS for a different client, the system will display a warning message letting you know that the system has not saved the SSN for the client, but that all other information has been saved.

6. If no clients match your search, recheck the information you entered for accuracy. If you suspect the client has not been entered into VIIS, proceed to “Entering New Clients.”

Use of Pick Lists in VIIS

When entering information on new clients or editing client information, you will use pick lists for many fields. VIIS uses pick lists — fields that contain a list of options from which you may choose — rather than free text fields for certain input data. The advantages of pick lists over free text fields include:

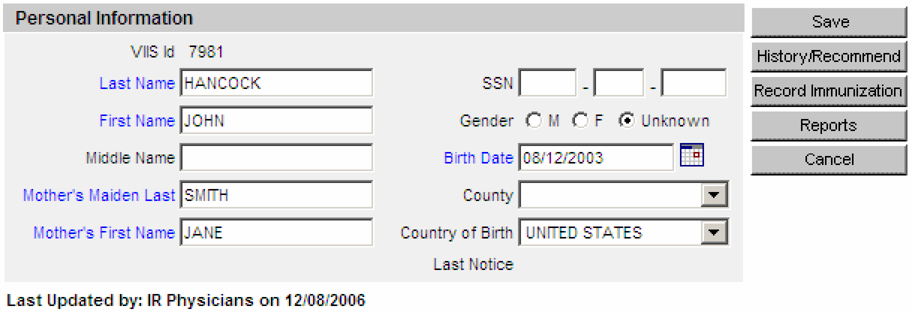
- Ease of use. Pick lists allow users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliant. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily.
- Uniformity of entered data. By choosing information from a pick list, users do not risk entering conflicting information that could decrease the accuracy of VIIS reports. For example, one user using a free text field might enter a county name using an abbreviation, while another user might spell out the entire name.
- Confidentiality. By using standard pick lists, VIIS avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

Editing/Entering Client Information

The Manage Client screen allows you to update or change specific, non-immunization information relating to any client in VIIS. The Enter New Client screen, accessed by clicking this option on the menu panel, allows you to input this information for a client new to VIIS. The Manage Client and Enter New Client screens are divided into four parts: personal information header, client information tab, responsible person(s) tab, and client comment(s) tab.

Personal Information Header

The Personal Information section at the top of the Manage Client/Enter New Client screens contains client-specific information fields used primarily to distinguish among clients when doing client searches. All fields shown in a blue font are required. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.



1. VIIS Id: This field shows the unique system ID for the patient.
2. Last Name: Required field.
3. First name: Required field.
4. Middle name: Optional field.
5. Mother's Maiden Last: Required field. VIIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
6. Mother's First Name: Required field. VIIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
7. SSN: The SSN field is optional. If the field is blank, a SSN may be entered. Once the SSN is entered and saved, however, a provider cannot change it. In addition, it will not show on the Manage Client screen (it will say "On File") and will not appear on any reports. *As the SSN cannot be easily changed once it is entered, enter this information very carefully.*
8. Gender: Click the appropriate radio button to choose male or female. This field is optional.
9. Birth Date: This is a required field. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press OK. Children entered by the Virginia Vital Records program do not have editable birth dates. The parent/guardian must contact the Virginia Vital Records program in the event an incorrect birth date is located. Contact the VIIS Help Desk to obtain the Vital Records phone number.
10. County: This optional field will be used by public organizations that are responsible for all clients within the county.
11. County of Birth: This field defaults to "United States." Use the pick list to select a different county of birth, if applicable
12. Last Notice: This field shows the last date that a recall/reminder notice was created for the client.

13. Updating organization: Below the Personal Information Header, the name of the organization that last updated the client's information displays in bold, along with the date the update was entered.

Generation of reminder and recall notices

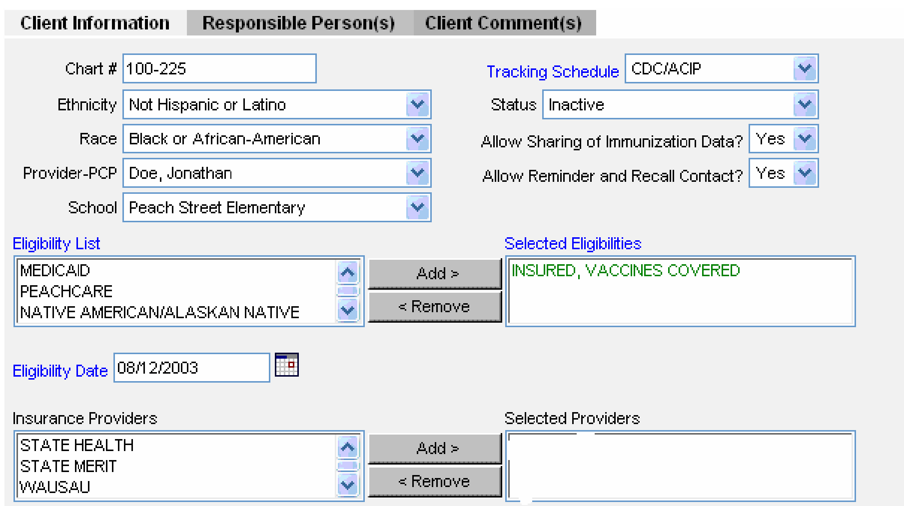
Reminder and recall notices are generated for every responsible person associated with a client, given that the following conditions are met:

- The client's status is not set to "Inactive" or "Permanently Inactive-Deceased on the Client Information tab.
- The "Allow Reminder and Recall Contact? Indicator on the Client Information tab is set to "Yes."
- The responsible person's "Notices?" indicator on the Responsible Person(s) tab is checked. The responsible person(s) checked for notices has sufficient name and address information listed in the Responsible Person(s) tab.

Client Information Tab

The Client Information tab gives additional information about the client, such as insurance carrier, primary care physician, chart number, etc. Only the Tracking Schedule and Funding Programs/Eligibilities (insurance/medical assistance information) and Eligibility Date fields under this tab are required.

1. Chart #: You may type in your organization's chart number for the client. A client may have numerous chart numbers associated with him or her; each number is organization dependent.
2. Ethnicity: Choose the client's ethnic background from the pick list provided.
3. Race: Choose the client's race from the pick list provided.
4. Provider (PCP): Fill in the client's primary care physician (PCP) or health care organization from the pick list, if provided. This information is used only for reporting.



5. School: Fill in the client's school from the pick list, if provided. This information is used only for reporting.
6. Tracking Schedule: This required field defaults to the Center for Disease Control and Prevention/ Advisory Committee on Immunization Practices (CDC/ACIP) schedule.
7. Status: Choose Active from the pick list if you want this client to be associated with your organization, meaning he or she is receiving services from you. When you specify a client as Inactive, you make him or her inactive for your organization only. This

information affects recall and reminder notices and Clinic Assessment Software Application (CASA) and Health Plan Employer Data and Information Set (HEDIS) reporting. Choosing Permanently Inactive — Deceased will inactivate the client for all organizations using VIIS. Choose this option only if you know the client to be deceased.

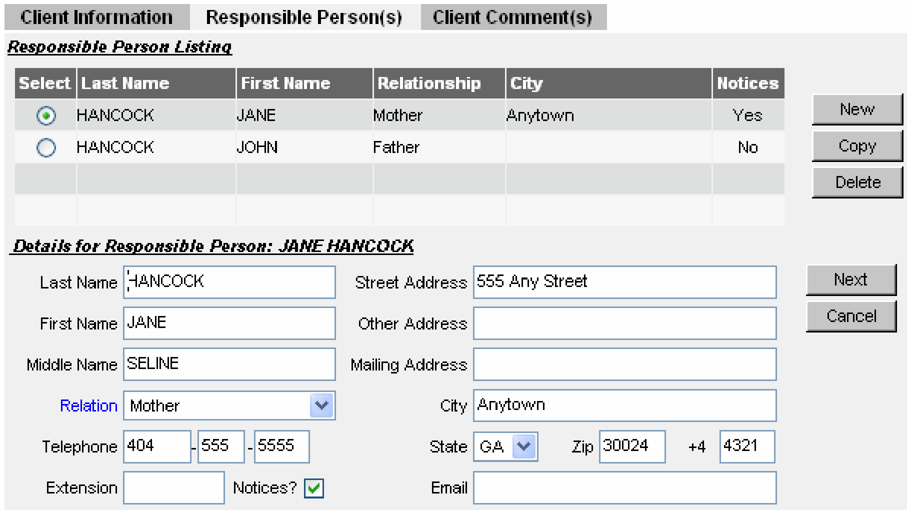
8. Allow Sharing of Immunization Data?: Parents or responsible persons may choose not to share their immunization information. If you choose No from the pick list, the record will be accessible only by your organization. Other organizations trying to access the record will receive a message referring them to you for further client information.
9. Allow Reminder and Recall Contact?: By choosing Yes from the pick list, you are allowing reminder/recall notices to be sent to this client's responsible person(s). If the parent chooses not to have reminder/recall notices sent, choose No from the pick list.
10. Funding Programs/Eligibilities: This is a required field that gives information on the client's eligibility to receive publicly funded vaccines. To select an eligibility type/funding program, highlight the appropriate funding source in the box at the left by clicking on it. Then press Add. Multiple funding programs/eligibilities may be selected.
11. Insurance Providers: To select an insurance provider from the list at left, highlight the provider by clicking on it. Then press Add. Multiple insurance providers may be selected. This information is used for HEDIS reporting

Once a status of Permanently Inactive – Deceased has been entered in the Status field, the field can non longer be edited by the organization. To change a status of Permanently Inactive – Deceased, contact the VIIS Help Desk..

Responsible Person(s) Tab

The Responsible Person(s) tab allows you to identify client contact information and the persons to whom you may send reminder/recall notices. The only required field under this tab is the Relation field. However, if you want notices sent to a responsible person, you will need to fill in the person's first and last name and full address, and check the Notices box.

1. Click on the Responsible Person(s) tab.



2. To edit an existing responsible person, do the following:
   - Click on the Select radio button next to the name of the person you wish to edit.
   - Change or add information for the fields listed.
   - Press Next.
3. To enter a new responsible person, fill in the following information:
   - Last Name: Enter the last name of the responsible person into this field.
   - First Name: Enter the first name of the responsible person into this field.
   - Middle Name: Enter the responsible person's middle name in this field.
   - Relation: Choose the relationship of the responsible person to the client from the pick list provided. This is a required field.
   - Telephone: Enter the responsible person's telephone number, including the area code, in this field.
   - Extension: Enter the responsible person's extension to the above telephone number, if any, into this field.
   - Street Address: Enter the responsible person's street address into this field.
   - Other Address: Enter the responsible person's additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
   - P.O. Box: Enter the responsible person's post office box, or mailing address, if different that the street address, into this field. If there is an address entered in this field, it will be

displayed as the client's address on the remaining client information tabs and client reports.

- City: Enter the responsible person's city into this field.
- State: Choose the responsible person's state from the pick list provided.
- ZIP: Enter the responsible person's ZIP code in this field.
- +4: Enter the responsible person's +4 code in this field, if it is known.
- Notices?: Check this box if you wish reminder/recall notices to be sent to this responsible person.
- Primary?: Check this box if you wish the displayed address appear on client reports and on client screen headers.

4. To enter a new responsible person and save the information you entered in the Responsible Person Listing or view the next responsible person's record, press Next.
5. To clear existing information and enter a new responsible person, press New.
6. To cancel unsaved information you entered, press Cancel.

Copying an existing record

1. Select the radio button next to the record you wish to copy on the Responsible Person Listing table.
2. Press Copy.
3. This information may now be edited and saved as another responsible person record.

Deleting an existing record

1. Select the radio button next to the record you wish to delete on the Responsible Person Listing table.
2. Press Delete.
3. Press OK in the confirmation box.

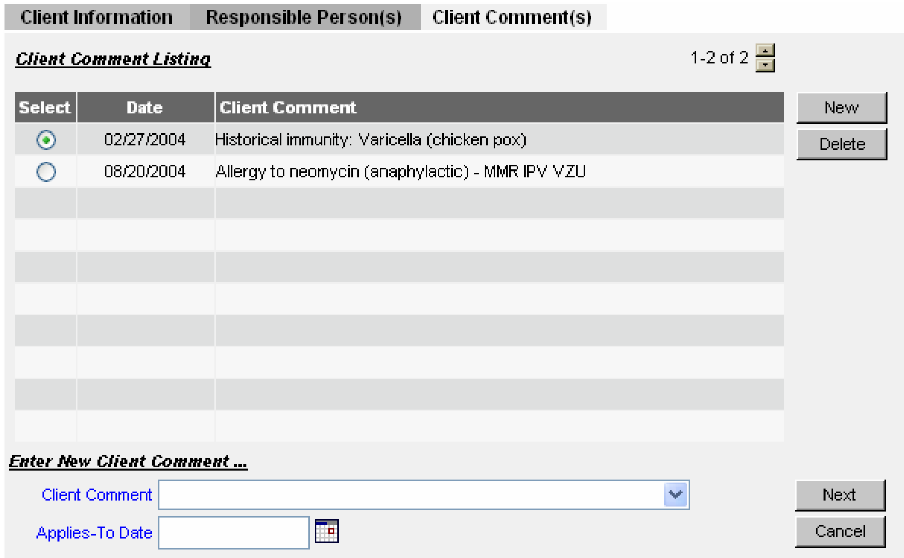
Client Comment(s) Tab

The Client Comment(s) tab allows you to enter comment and contraindication information for a client in pick list form.

1. Click on the Client Comment(s) tab.

Restart Comments
If a client has a comment indicating the restart of a vaccine group and an Applies To Date is specified, all vaccinations prior to that date are not evaluated as part of the serve. Any doses recorded on or after the Apples To Date will be evaluated as if they were the first doses received for that vaccine group.

Immunity Comments
Immunity comments are linked to vaccine group recommendations. If a client has an immunity comment and an Applies To Date is specified. a recommendation for that vaccine group will not display on the client's record.



2. Enter the following information:

- Choose the appropriate comment/contraindication from the Client Comment pick list.
- Enter the date to which the comment refers in the Applies-To Date field. This field is required if a client comment has been selected. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

3. To enter the comment into the Client Comments Listing and enter a new comment or view the next comment, press Next.
4. To clear existing information and enter a new comment, press New.
5. To cancel unsaved information you entered, press Cancel.
6. To read comments in a list with more than 10 comments, use the scrolling arrows at the top right corner of the box. A counter near the scrolling arrows displays the number of comments entered..

Deleting an existing comment

1. Select the radio button next to the comment you wish to delete on the Client Comment Listing table.
2. Press Delete.
3. Press OK in the confirmation box.

Saving Client Information

There are several ways to save information on the Manage Client/Enter New Client screens:

Save:	When pressed, the SAVE button at the top of the screen will save all information fields within the Personal Information Header, Client Information Tab, Responsible Person(s) tab, and Client Comment(s) Tab to the VIIS database. Once the client data is saved, the message “Client Up-dated” will appear at the top of the Personal Information Header.
History/Recommend:	As with the SAVE button, the HISTORY/RECOMMEND button will save all information fields. Once the information is saved, the clients Immunization History screen will display.
Record Immunization:	When the RECORD IMMUNIZATION button is pressed, all information fields will be saved and the Pre-Select immunization screen will display. This button allows you to by pass the history screen for a client and go directly to adding immunizations.
Reports:	As with the SAVE button, the Reports button will save all information filed. Once the information is saved, the Reports Available for Client screen will display, so that a report may be generated for the client. Refer to the Reports and Forms chapter of this manual for more information on reports.
Add Next:	When the ADD NEXT button is pressed, all information fields will be saved and a blank Edit/Enter New Client screen will be displayed.
Cancel:	When pressed, the CANCEL button clears all entered information and does not save it to VIIS. The Find Client or Enter New Client screen is displayed.

Social Security Numbers
If you attempt to enter a new client or edit an existing client using a SSN that is already stored in VIIS for a different client, the system will display a warning message letting you know that the system has not saved the SSN for the client, but that all other information has been saved.

Deduplicating Client Records

After you enter a new client and press one of the buttons that will save the data, VIIS initiates a process that ensures that the client information you entered does not duplicate a client that already exists in VIIS.

If after attempting to save a new client you receive a message box titled “Client Match Detected,” VIIS has determined that the client you are attempting to save already exists in the database. You should select the client record by clicking the link provided

If after attempting to save a new client you receive a message box titled “Client Match Detected,: you should read the message and proceed carefully. A table below the message box contains one or more names of potential matches within VIIS. Click on each last name to display his or her information. VIIS will identify matching clients even if the client has had a name change; therefore, if you do receive a list of potential matches, click on the link(s) to determine whether one of the links matches your client’s record.

Client Match Detected

Based on the new client information that you entered, it is likely that your client is already registered in this system. You are strongly urged to consider using one of the clients listed below. To select a matching client, click on the Last Name of the client in the table shown below. If you still wish to override the system match and save the client as entered on the previous page, click the Override button below.

Please keep in mind that if you choose to ignore a legitimate client match, the immunizations stored for your client will not be contained in one client record. As a result, client immunization management will become unwieldy.

Create New Client

Possible Client Matches:1

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
HANCOCK	JOHN	08/12/2003	100-225	JANE	SMITH	M	555-5555

If after reviewing all the names given in the table you do not find a match for your client, press the Create New Client button. A confirmation box will appear; press OK. Be aware that if you do override the listed matches and end up creating a duplicate record for a client, it will be difficult to manage the client’s immunization and personal information and the registry will lose its accuracy and efficiency.

Managing Immunizations

In this chapter:

Viewing Immunization Information
Editing Immunizations
Entering Immunizations

The Immunization History screen contains a large amount of useful information. If for this reason, you wish to print this screen please use either the Print or the Print Confidential button on the Immunization History screen to print this page; using the Print button will display the page without top and side VIIS menus, and using the Print Confidential button will display the page without menus and without the patients confidential information.

The immunization function of VIIS allows you to view and manage historical immunization information and add immunizations for the client. It also recommends immunizations based on a tracking schedule.

Immunization information for a specific client may be accessed one of two ways:

1. Choose Manage Client under the Clients section of the menu panel. This will bring up the Find Client screen. For information on finding clients, refer to the *Finding Clients* section in the Managing Clients chapter of this manual. Once client is retrieved, select the button ***History Recommend*** button to display the clients Immunization History screen.
2. Or, choose Manage Immunizations under the Immunizations section of the menu panel. This will bring up the Find Client screen. For information on finding clients, refer to the *Finding Clients* section in the Managing Clients chapter of this manual.

Viewing Client Immunization Information

The Immunization History screen holds a large amount of information on each client in VIIS. The screen has three sections: Client Information, History, and Vaccines Recommended by Selected Tracking Schedule.

Client Information

The Client Information section at the top of the Immunization History screen gives vital information on the client, such as name, date of birth, tracking schedule, address, chart #, and a scrollable list of client comments. Comments that are often contraindications with the use of a particular vaccine will be identified on the client's immunization recommendations. Use this information to verify that the client indicated is the client for whom you were searching. To edit this information, press Edit Client and refer to the *Editing/Entering Client Information* section in the Managing Clients chapter of this manual.

Client Information					**Eligible for State Supplied Vaccine: Yes**
Client Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Chart #
IMA CLIENT	NOV-07-2001	F	PARENT	CDC/ACIP	
Address	Any Street, , Atlanta, GA 23111 (555) 555-5555				
Comments	{1 of 1} .. JUN-06-2002~Diagnosed immunity: Varicella (chicken pox)				

In the top right corner of the Client Information section, the message "VFC Eligible" appears, followed by "Yes" or "No." This message indicates whether the client is eligible for the Vaccines for Children (VFC) program.

History

This table lists all the immunizations the client has received to date. Immunizations are listed alphabetically by vaccine group and ordered by “Date Administered.”

History Add Immunization | Edit Client | Reports | Print | Print Confidential

Vaccine Group	Date Administered	Series	Trade Name	Owned?	Reaction	Hist?	Edit
DTP/aP	Jun-15-2002	1 of 5		No		Yes	
	Jun-30-2002	NOT VALID		No		Yes	
	Apr-15-2003	2 of 5	Infanrix ®	No			
HepB	Jun-15-2002	1 of 3		No		Yes	
Hib	Jun-15-2002	1 of 4		No		Yes	
	Sep-03-2002	2 of 4	PedvaxHIB ®				
Measles	Mar-15-2004	1 of 2	MMR II ®	No		Yes	
Mumps	Mar-15-2004	1 of 1	MMR II ®	No		Yes	
Rubella	Mar-15-2004	1 of 1	MMR II ®	No		Yes	
Varicella	Feb-01-2004	1 of 1	Varivax ®	No	Yes	Yes	

Vaccine Group: This is the vaccine group name.

Date Administered: This date is the actual day the client was given the vaccine. To view the tracking schedule information for the selected immunization or an explanation of why an immunization is not valid or appropriate, click on this date. “Historic” may display in this column for a previously administered vaccinations, such as small-pox, when the client doesn’t have documented proof of the date of the immunization.

Series: The number in this column is created by validating the immunization date against the client’s assigned tracking schedule. The system then provides the number of the immunization within the series or indicates that the vaccine was invalid because the client was not old enough to receive it or not enough time elapsed between doses. “Pending” may also appear in this column for certain vaccinations, such as a small pox immunization awaiting an evaluation. “No Take” or “Equivocal” will display if the current vaccination has a no take or equivocal response. ”Partial Dose” will display if the shot is flagged as a partial dosage.

Trade Name*:* This is the manufacturer’s trade name of the vaccine.

Dose: This column indicates whether full, half or multiple doses were administered to the client.

Owned vs. Not Owned Immunizations

A single provider does not own any of the clients within VIIS, but an organization does own the immunizations it provides. If the “Owned” column on the immunization History table shows a “No” for one or more vaccines, this indicates that another organization entered the vaccine information and is attesting to the validity of the information.

A vaccine may be owned and historical, which means data was taken from a paper record or owned and “new”, which means the vaccine, drew from VIIS inventory. Any provider may edit a historical immunization, but “new” or non-historical shots may only be edited by the organization that administered the vaccine.

Immunization Color Coding

Yellow: A date shaded yellow indicates that today's date is equal to or past the earliest date and before the recommended date for an immunization that has not yet been received.

Green: A date shaded green indicates that today's date is equal to or past the recommended date and before the overdue date for an immunization that has not yet been received.

Blue: A date shaded blue indicates that today's date is equal to or past the overdue date and before the latest date (if a maxi-mum age exists) for an immunization that has not yet been received.

Pink: A row shaded pink indicates the client has completed the immunization series, has completed the series early, or has exceeded the maxi-mum age for the vaccine.

Owned?: If this column indicates "No," another provider organization entered the information and is attesting to its validity. To view the immunization data, click on the "No" link in the "Owned" column or click on the notepad icon in the "Edit" column.

Reaction: If this column indicates "Yes" and appears in red, this means a reaction to a vaccine was recorded. To view the client's reaction, click on the "Yes" link in the Reaction column or click on the notepad icon in the "Edit" column.

Hist?: If this column indicates "Yes," this record is historical, meaning the immunization information was the result of a data transfer or was taken from a paper record and did not come from VIIS inventory. Otherwise, it came from a VIIS provider's inventory; see "Owned?" on the previous page.

Edit: When you click on the notepad icon in this column, you will be able to edit the recorded immunization using the Edit Immunization screen, as long as the immunization is owned by your organization or is historical.

Below the History section, the client's exact age is shown in a solid blue field. The age also displays on the printable version of this page.

Vaccines Recommended by Selected Tracking Schedule

This table lists all vaccines recommended by the tracking schedule associated with the client. Immunizations are listed alphabetically.

Vaccines Recommended by Selected Tracking Schedule [Add Selected]

Select	Vaccine Group	Earliest Date	Recommended Date	Overdue Date	Latest Date
☑	DTP/aP	May-13-2003	May-13-2003	**Jul-15-2003**	Apr-10-2009
	HepB	Jul-13-2002	Jul-15-2002	**Sep-10-2002**	**Contraindicated**
☑	Hib	Oct-01-2002	Nov-03-2002	**Dec-03-2002**	Apr-10-2007
☐	Measles	**Apr-12-2004**	Apr-10-2006	Apr-10-2009	
	Mumps	**Complete**			
☑	PCV	Apr-10-2004	**Apr-10-2004**	May-10-2004	Apr-10-2007
☑	Polio	May-22-2002	Jun-10-2002	**Jul-10-2002**	
	Rubella	**Complete**			
	Varicella	**Complete**			

Select: Vaccines that are equal to or past their recommended date are automatically selected in the Vaccines Recommended section. You may also check other vaccines for inclusion in the Vaccines Recommended section. The selections will display on the Select Immunizations screen when the [Add Selected] button is pressed.

Vaccine Group: This column lists the vaccine group name. To view the tracking schedule information for the selected immunization or an explanation of why an immunization is not valid or appropriate, click on this date.

Earliest Date: This date is the earliest date that the client may receive the vaccine.

Recommended Date: This date is the recommended date that the client may receive the vaccine.

Overdue Date: This date is the date at which the client is past due for the immunization. This will also trigger the use of an accelerated schedule for future immunizations.

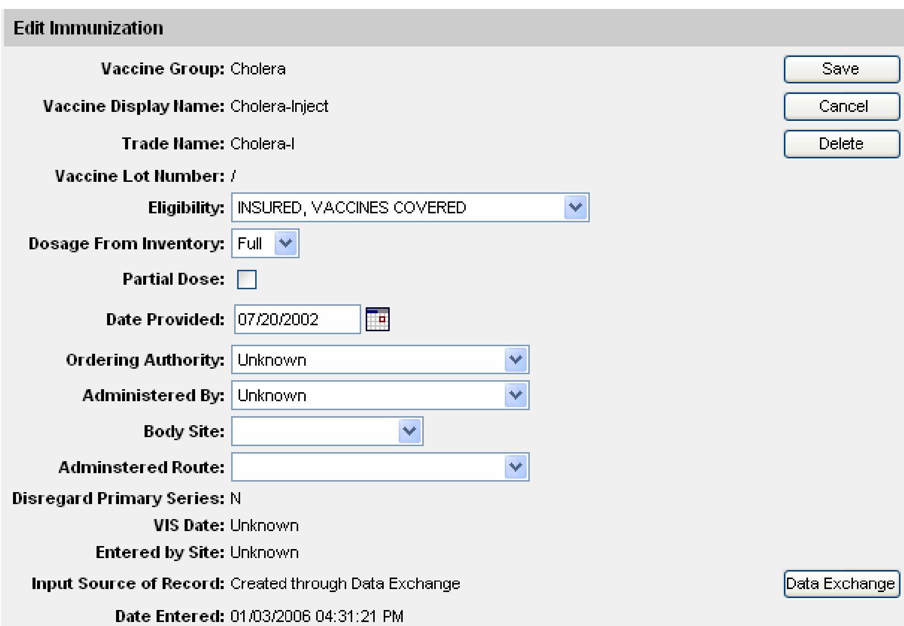
Latest Date: This date is the latest date at which the client may receive the vaccine.

Editing Immunizations

Editing Historical Immunizations

To edit a historical immunization, use the following steps:

1. On the Immunization History table, select the vaccine you wish to edit by clicking on the vaccine's notepad icon in the "Edit" column.



2. In the Edit Historical Immunization screen, you may edit information for the Trade Name, Vaccine Lot Number, Date provided, and Provider Organization Name Fields.

Duplicate Immunizations

VIIS not allow duplicate immunizations to be entered for a client. If you attempt to enter an immunization for a client given within two days before or after an existing immunization with the same trade name, you will receive the message, "Possible duplicate immunizations exist. Modify or delete your entries." VIIS will then allow you to change or delete the entry(s) in question.

When you enter an immunization with a trade name that duplicates an existing, historical immunization with no trade name, the newly entered immunization will update the exiting immunization.

When you enter a duplicate immunization with an overlapping vaccine group but a different trade name, VIIS will alert you to the duplicate but will allow you to overwrite the duplicate immunization.

3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.
4. Press Save.

Vaccines Listed on Selecting Immunizations to Add Screen

Within the Immunizations section of the Select Immunizations screen, vaccines at the top of the screen under “Active immunization inventory on <date>” are those for which inventory exists at the site selected in the defaults of New Immunizations section. Once a new site is selected, the immunizations section will automatically update to reflect the immunization inventory of that site.

The vaccines shown at the bottom of the screen under Immunizations Available for Historical Shots Only are those that are not available in inventory for the currently selected sites. These vaccines may be selected for entering historical immunizations only.

Deleting Historical Immunizations

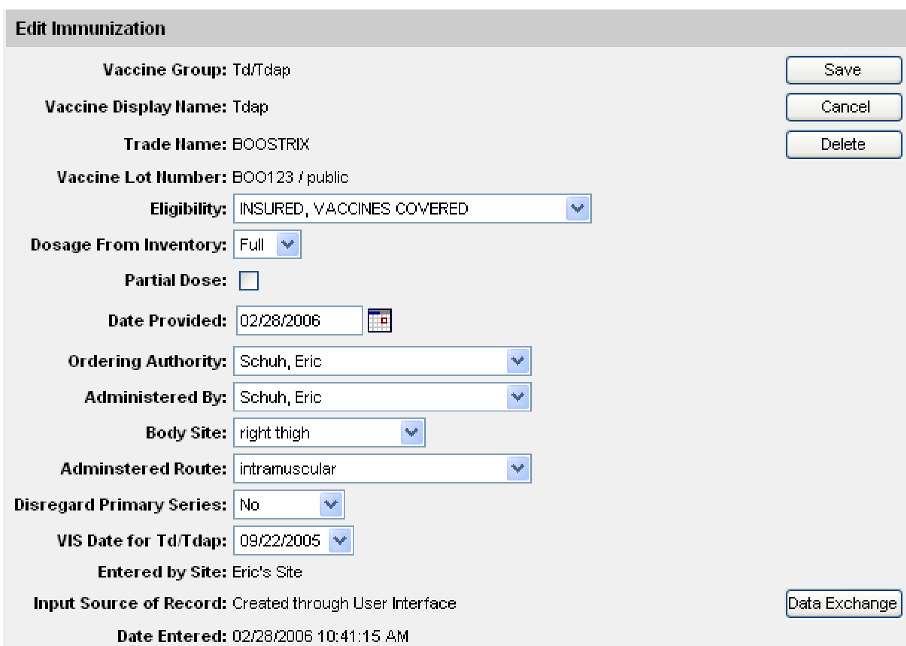
To delete a historical immunization, follow these steps:

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine’s notepad icon in the “Edit” column.
2. At the Edit Historical Immunization screen, press Delete.
3. Press OK in the confirmation box.

Editing Owned Immunizations from Inventory

An immunization that is not historical is one that was given out of inventory. You will not be able to edit non-historical immunizations that are owned by another organization. To edit an immunization given out of inventory, follow these steps:

1. On the Immunization History table, select the vaccine you wish to edit by clicking on the vaccine’s notepad icon in the “Edit” column.



2. To indicate a half or multiple dosages, choose the appropriate response from the Dosage from Inventory pick list. For example:

- Half: If a half dosage of an adult formulation was used for a child, indicate half.
- Multiple: If two or more doses of a pediatric formulation were used on an adult, select the number of doses used.

3. To indicate a partial dosage, check the Partial Dose checkbox. For example, check this box if a partial dosage was administered because the needle broke or came out or the vial broke.
4. Update information in the Eligibility, Dosage from Inventory, Partial Dose, Date Provided, Ordering Authority, Administered By, Administered Route, and/or Body Site fields on the Edit Immunization screen.
5. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, choose an alternate date from the pick list. This date can only be edited the same day a new immunization is entered into VIIS. At any other time, this field will be un-editable.
6. To record the results of an immunization (the Record Immunization Result box will only display for certain immunizations with a date that are new or historical [but not HISTORIC]), enter a take response from the Result pick list. Then, enter the Result Date in MMDDYYYY format. If the immunization is new (not historical), you may choose the name of the Result Reader from the pick list.
7. To record a reaction to the immunization, check the box next to the applicable reaction.
8. Press Save.

Deleting New Immunizations

Note that you will not be able to delete non-historical immunizations that are owned by another organization.

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine's paintbrush icon in the "Edit" column.

At the Edit Immunization screen, press Delete.

Press OK in the delete confirmation box.

Choosing vaccines for a past date

The vaccines listed on the Select Immunizations to Add screen will reflect the inventory of the current date, rather than the date the immunizations may have actually occurred. To adjust the vaccine listing to reflect the inventory of a past date, follow these steps:

1. Enter the Date Administered under the Defaults for New Immunizations section.
2. Press the Activate Expired button to the right of the Date Administered fields.

Selecting immunizations to Add

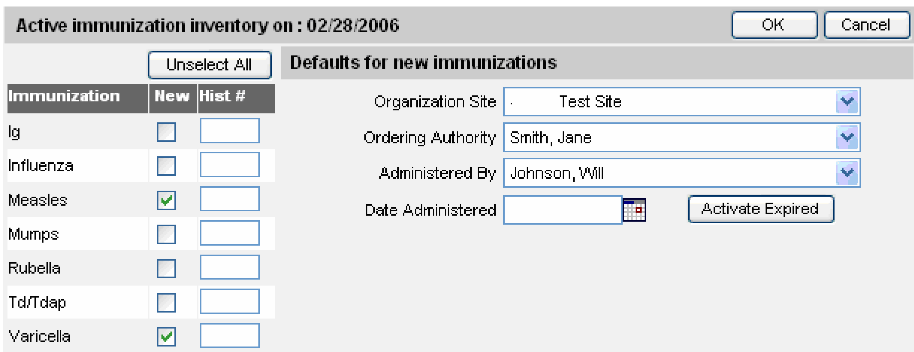
When entering default values on the Selecting Immunizations to Add screen for either new or historical immunization, note that you will have the opportunity to change most of these values for each individual vaccine on the next screen, the Immunization Entry screen. This mechanism allows you to enter batch historical information or new vaccination information on the Selected Immunizations screen, while giving you the opportunity to override these defaults in the next screen.

Entering Immunizations

To add new and/or historical immunizations, follow these steps:

1. At the Immunization History screen, press Add Immunization to display the Select Immunizations screen without pre-selecting recommended vaccines. Press Add Selected to display the Select Immunizations screen with all of the selected immunizations from the recommended vaccines list checked.

Entering New Immunizations:



2. At the Select Immunizations screen, select the check boxes in the “New” column for the vaccines that were given. For combination vaccines such as MMR or HepB-Hib, select only one vaccine component – for HepB-Hib select only HepB or Hib.

   Note: The section that allows new immunizations to be given from inventory also contains a “Hist #” column, which allows a user to enter historical immunizations as well. (See “Entering New and Historical Immunizations” in this chapter.)

3. You may also choose a default Organization Site, Ordering Authority, and Administered By value for new immunizations by choosing from the pick lists in the Defaults for New Immunizations section. You will be able to edit these defaults for each immunization on the Record Immunizations screen.

4. Choose a date for the Date Administered field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. If using the calendar icon, choose a month and year from the pick lists provided and choose a day by clicking on the appropriate calendar day. Press OK.

5. If you are entering a new immunization for a past date and do not see one or more of the selected vaccines listed in the Immunization section to the left, press Activate Expired. Pressing this button will display the active vaccine inventory for the date you entered in the Date Administered field.
6. In the immunization section to the left of the screen, check the boxes of the new immunization that were given by clicking on the appropriate vaccines in the "New" column.
7. If you do not need to enter historical immunizations, Press OK to go to the Record Immunizations screen and proceed to Step 9.

Immunizations available for historical shots only

Provider Organization ______ Date Administered ______

Immunization	Hist #	Immunization	Hist #	Immunization	Hist #
Adeno		Lyme		Smallpox	
Anthrax		MCV		Tetanus	
BCG		MPSV		Typhoid	
Cholera		PCV		Yellow Fever	
DTP/aP		PPV			
Diphtheria		Pertussis			
Encephalitis		Plague			
HepA		Polio			
HepB		Rabies			
Hib		Rotavirus			

8. Select historical immunizations by typing the number of immunizations administered for each vaccine into the text box in the "Hist #" column. For example, if a client received two historical DTaP vaccines, enter "2" in the "Hist #" box. Do not click in the check box in the "New" column for the vaccine, unless the client also received this vaccine from inventory. Enter all historical vaccine counts on this page.
9. Enter default information for historical immunizations. You will be able to edit both of the following defaults for each immunization on the next screen.
   - Enter the name of the organization that administered all or most of the immunizations in the Provider Organization field in the Immunizations Available for Historical Shots Only sections.
   - Enter a default immunization date in the Date Administered field. Use the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.
10. Press OK at the top of the screen.

At the bottom of the immunization entry screen, default VIS dates will be displayed for each new immunization entered. To change the default VIS date, follow the instructions under the "Editing Owned Immunizations from Inventory" section of this chapter. The VIS date must be changed on the same day the immunization is entered into VIIS.

Validation of Combination vaccines

VIIS validates each valent separately when recording combination vaccines. For example, if a vaccine such as Comvax is given when only one component is valid, that component will be treated as if it were a single valent formulation and validated. VIIS will also allow for change in series for combination vaccines if one component is not valid after the series has been selected.

Immunization Entry screen

1. At the next screen, verify or enter the Date provided and ordering Authority for the new immunization(s) listed in the New Immunizations table.
2. Place a check in the Remove check box only if this immunization should not be entered into the VIIS database. For example, if VIIS informs you that the immunization is a duplicate, you should remove or modify the entry.
3. Chose a Trade Name-Lot from the pick list for the first listed vaccine.
4. Enter pick list information for the following fields for each vaccine:
    - Dose: This field should be filled with the dosage given to the client. Use the pick list to select full, half, or multiple doses
    - Administered By: This field should be filled with the name of the clinician that administered the immunization. The field will display default data.
    - Body Site: This field should be filled with the area of the body where the immunization was given.
    - Route: This field should be filled with the method of administration; for example, intramuscular, oral, etc. This field will display default data.
    - Under Historical Immunizations, enter a Date provided for each dose of each listed vaccine.
    - If known, choose a trade Name from the pick list, choose a Lot Number from the pick list, and verify or change the Provider Organization for each immunization listed. These are not required fields.
    - Press OK.
    - VIIS will take you back to the Immunization History screen and will display the entered vaccines with dates and validation, in addition to updated vaccine recommendations.

Applying a Prerequisite Override to a Client's Immunization

A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a client reaches a certain age. A prerequisite override is not automatically applied to an individual client's immunization record. To apply a prerequisite override to an immunization, follow these steps:

1. Enter the immunization as described in the Entering Immunizations section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.

2. Follow Steps 1-3 in the Editing Owned Immunization from Inventory section of this chapter.
3. In the field marked Disregard Primary Series, choose yes. Note: this field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the client is greater than or equal to the override age) meet those of the prerequisite override.
4. Press Save.

Other Features on the Immunization History Screen

The Immunization History screen contains two links to other VIIS functions. These links are:

Edit Client:	Pressing this button will return you to the Manage Client screen for the client
Reports:	Pressing this button will bring you the Reports Available for This Client screen, at which you may generate Client-specific reports. Refer to the Reports and Forms chapter for this manual for more information.
Print:	Pressing this button will display the client's immunization information without the top or side VIIS menus. To print this screen, click on the printer icon on your browsers or click File, Print and press OK. Press your browser's Back button to return to the client screen.
Print Confidential:	Pressing this button will display the client's immunization information without top or side VIIS menus and without client demographic information. To print this window, click on the printer icon on your browser or click File, Print, and press OK. Press your browser's Back button to return to the client screen.

Reports and Forms

In this chapter:

Client-Specific Reports
Reminder/Recall Notices
New Client Form
CASA Extracts
Assessment Reports
Ad Hoc Reports
Vaccines for Children Reports
Callback Lists

The following are categories of reporting/exporting functions available through VIIS:

- Client-specific.
- Multiple-client.
- Inventory-related.

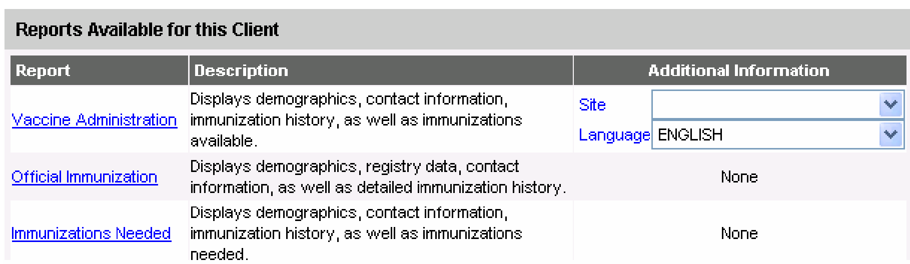
Client-Specific Reports

Three reports are available for generation for a client. These reports are the Vaccine Administration Record, the Official Immunization report and the Immunizations Needed report.

Vaccine Administration Record

The Vaccine Administration Record (VAR or “signature form”) displays demographics, contact information, immunization history, and immunization inventory available for the selected clinic site. The responsible person’s and clinician’s signatures are also gathered on this form. To generate the report, follow these steps:

1. From a client’s Manage Client screen, Manage Immunizations screen, or Reports Only User screen, press Reports.
2. At the Client Reports screen, choose a Site under the “Additional Information” column for the Vaccine Administration report.



Reports Available for this Client

Report	Description	Additional Information
Vaccine Administration	Displays demographics, contact information, immunization history, as well as immunizations available.	Site Language ENGLISH
Official Immunization	Displays demographics, registry data, contact information, as well as detailed immunization history.	None
Immunizations Needed	Displays demographics, contact information, immunization history, as well as immunizations needed.	None

3. Click on Vaccine Administration, which is underlined and in blue text.
4. Once the report is generated, it will be displayed using Adobe Acrobat Reader®. Refer to the Optimizing VIIS chapter in this manual for more information on Acrobat Reader®.
5. To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
6. To return to the Client Reports screen, press the Back button on your browser.

Official Immunization Report

The Official Immunization report displays demographics, contact information, and a detailed summary of the client’s immunization history. This report will typically be used as a physician's chart copy. To generate the report, follow these steps:

1. From a client's Manage Client screen or Manage Immunizations screen, press Reports.
2. At the Client Reports Client screen, click on Official Immunization, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®. Refer to the Optimizing VIIS chapter in this manual for more information on Acrobat Reader®.
4. To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
5. To return to the Client Reports screen, press the Back button on your browser.

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization history, and immunizations recommended by date according to the tracking schedule assigned to the client. To generate the report, follow these steps:

1. From a client's Manage Client screen or Manage Immunizations screen, press Reports.
2. At the Client Reports screen, click on Immunizations Needed, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®. Refer to the Optimizing VIIS chapter in this manual for more information on Acrobat Reader®.
4. To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
5. To return to the Client Reports screen, press the Back button on your browser.

Generation of reminder and recall notices

Reminder and recall notices are generated for every responsible person associated with a client, given that the following conditions are met:

- The status "Active" on the Client Information tab is checked for your organization.
- The "Allow Reminder and Recall Contact?" indicator on the Client Information tab is checked.
- The responsible person's "Notices?" indicator in the Responsible Person(s) tab is checked.
- The responsible person has sufficient name and address information listed in the Responsible Person(s) tab.

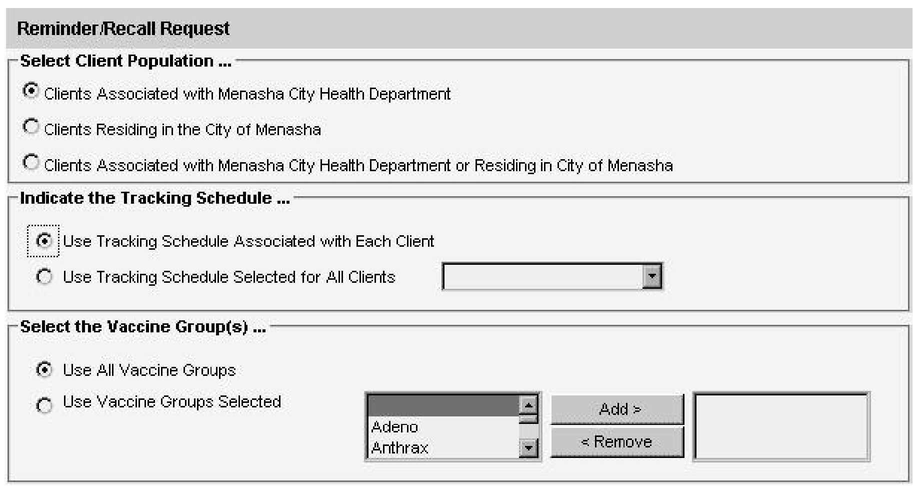
Reminder/Recall Notices

From the Reports menu option, you may generate reminder and recall notices, which include letters, cards, address labels, client listings, and downloadable text files.

Reminder/Recall Requests

To select and submit reminder/recall criteria for clients, you will need to fill in the Reminder Request screen, an online form. Follow these steps to generate reminder/recall requests:

1. Click Request Reminder under Reports on the menu panel.

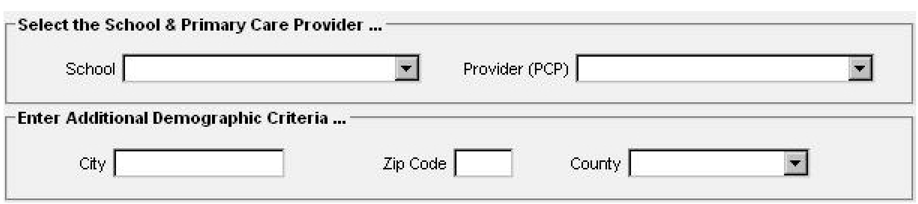


2. Client Population: This section will only display for city and/or county organizations.
   - Indicate you wish this reminder to be for all clients associated with your organization by clicking the top radio button.
   - Indicate you wish this reminder to be for all clients within your city or county by clicking the second radio button.
   - Indicate you wish this reminder to be for all clients associated with your organization and in your city or county by clicking the third radio button.
   - If you chose the second or third radio button, above, select your city or county by double clicking a city or county name or by highlighting the name and pressing
3. Tracking Schedule: In the top section of the Reminder/Recall Request screen:
   - Indicate whether you wish to use the tracking schedule associated with each client or a uniform tracking schedule for all clients by clicking the appropriate radio button.
4. Vaccine Groups: in the vaccine groups section of the screen:
   - Indicate whether you wish to include all vaccine groups in the

search criteria or if you wish to include only selected groups by clicking the appropriate radio button.

- If you choose to include only selected vaccine groups, select these groups by double clicking a group or highlighting a chosen group and pressing ADD. Do this for each group desired.
  Note: This will limit the search to only those clients who will be due/past-due for the selected immunizations. However, VIIS will provide a list of all immunizations for which the selected clients are due/past-due.

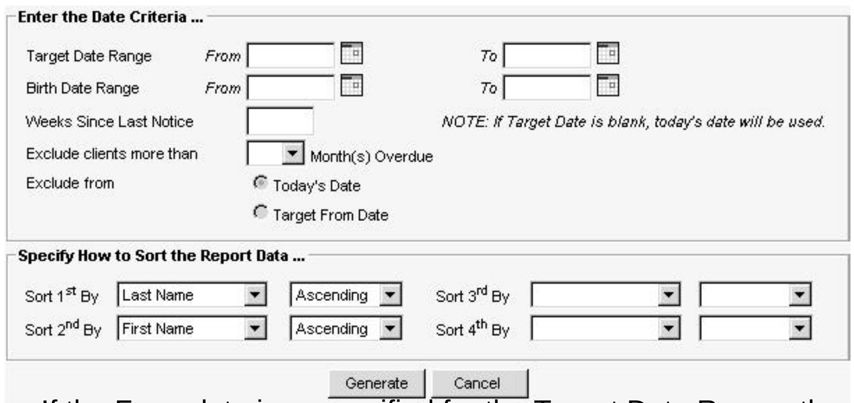
5. School/Primary Care Provider: Choosing a school or primary care provider allows you to narrow your search to only the clients assigned to a particular school or physician/clinic. If you do not wish to specify a school and/or provider, leave these fields blank.



- To choose a school, select a school name from the pick list provided.
- To choose a primary care provider, select a physician or clinic name from the pick list provided.

6. Additional Demographic Criteria: Entering a city and/or ZIP code will narrow your search to only the clients associated with the entered geographical area. However, by entering a county, you will expand your search to all responsible persons who reside in the selected county. Note: The county option is only available to county public health organizations. If you do not wish to specify a city, ZIP code, or county, leave these fields blank.
   - To enter a city, type the city name within the first field.
   - To enter a ZIP code, enter the five-digit number in the next field.
   - To enter a county, choose from the pick list in the third field.
7. Date Criteria
   - Target Date Range: When a target date is specified, the report will include those clients that are due/overdue for immunizations within the date range. To choose a target date range, enter the beginning date in the From text box and the ending date in the To text box in MMDDYYYY format.

Note: These dates can range from the past to the future; therefore, you have the capability to run a recall, reminder, or a combination of the two.



- If the From date is unspecified for the Target Date Range, the system will use the date that you run the report.
- If the To date is unspecified for the Target Date Range, the system will use the date that you run the report.
- If both the From and To dates are left blank, the system will find those clients who are due or overdue as of the date that you run the report.
- Birth Date Range: When a birth date range is specified, the report will return those clients who have a birth date that falls within the range entered. To choose a birth date range, enter the beginning date in the From text box and the ending date in the To text box in MMDDYYYY format.
- If the From date is unspecified for the Birth Date Range, the report will include the oldest clients in the system, some born in the 1800s.
- If the To date is unspecified for the Birth Date Range, VIIS will use today' date.
- Weeks Since Last Notice: When a number is entered in this field, the report will include only those clients who have not received a reminder notice within the specified number of weeks prior to the current date.

Note: Clients are shared between organizations; therefore, another organization may have recently generated a notice for the client.

- Exclude Clients More Than: To exclude clients who are overdue and who may have received several reminders already, provide a number of months for the pick list provided.
- Exclude from: If excluding clients overdue for a certain number of months, indicate the date from which clients should be excluded; choose either today's date or the Target "From" Date (uses the date from the field at the top of the section) by clicking the appropriated radio button. If no target date information is entered, clients will be excluded from today's date.

8. Sorting Criteria: This section allows you to specify how the data will be sorted. If a sort order is not specified, VIIS will sort the report results first by the client' last name in ascending order (A to Z), then by the first name in ascending order.
    - Sort 1st By: Choose a primary information field by selecting from the pick list provided.
    - Ascending/descending order: Choose how the primary field is assorted; choose either ascending (A to Z) or descending (Z to A) order from the pick list.
    - Complete additional ordering sequences for the second through fourth sorts.
9. Generate the report: Press the ***Generate*** button. Depending upon the number of clients associated with your provider organization, it may take five minutes or more to generate the date for the various reports. While the data are being generated, the Request and Output status page indicates the percentage of completion.
10. Periodically press ***Refresh*** to update the status. You may work in other areas of the system while waiting for the reminder/recall request to complete. You may check the status of your request by clicking on Check Reminder Status under the Reports menu.

Summary Screen

When the report is complete, you may click on the blue underlined date to go to the Reminder Request Process Summary screen. The Summary screen lists the number of clients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary		
Step	**Criteria Evaluated at this Step**	**Clients**
1	Clients **associated** with *Virginia Department of Health*.	16
2	Clients **immunized** by *Virginia Department of Health*.	14
3	Clients that are **active** within *Virginia Department of Health* and **allow Reminder & Recall Contact**. Additional criteria includes: • **Birthdate range** is not specified; • **County** is not specified; • **School** is not specified; • **Provider** is not specified; • **Weeks Since Last Notice** is not specified.	12
4	Clients that have one or more responsible persons that **Receive Notices**. Additional criteria includes: • **City** is not specified • **Zip Code** is not specified.	6
5	Clients that **Allow Sharing of Immunizations**.	6
6	Clients that meet the following criteria regarding vaccination status: • Clients that are **Recommended or Overdue** for one or more vaccinations **as of 06/21/2006**; • Use all **vaccine groups**; • Use **ACIP** for all clients. • **Exclude Overdue Reminders** is not specified.	6
	Total Number of Clients Eligible for Reminder	**6**

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options	
Set last notice date to today for all eligible clients when you select a report output.	☑
Revert last notice date to previous last notice date for all clients ***eligible for this reminder****.*	Revert Eligible
Revert last notice date to previous last notice date for ***all clients immunized*** *by Virginia Department of Health.*	Revert All
Return to the previous screen.	Cancel

1. Set the last notice date to today' date. This is the default option and is indicated by a check mark.
2. Set the last notice date to reflect the previous last notice date for all clients eligible for this reminder by pressing ***Revert Eligible***. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for the recipients of this reminder.
3. Set the last notice date to reflect the previous last notice date for all clients immunized by your organization by pressing ***Revert All****.* Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for all clients immunized by your organization.
4. Return to the previous screen. Press ***Cancel*** to return to the

Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Letters

The letter output option allows you to generate a standard form letter for the responsible person(s) for each client returned on your query. The letter allows room at the top for your organization' letterhead. The body of the letter includes the client' immunization history, recommended immunizations and due dates, and up to two lines of free text and/or a telephone number. To generate letters, follow these steps:

1. Under the Additional Input column or the Letter section of the table, enter:

Reminder Request Output Options

Output	Description	Additional Input	
Reminder Letter	Standard Reminder Letter.	Report Name	05/01/2001 Reminder
		Free Text	Time for your shots!
		Phone #	(555) 555-5555

- A report name in the appropriate field, if desired.
- Additional information in the Free Text field, if desired. You may include a maximum of 400 characters in this field.
- A telephone number in the appropriate field, if desired.

2. Click on Reminder Letter, which is underlined and in blue text.
3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   - You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press ***Refresh*** occasionally

to check the status.

4. Once the report name is underlined and appears in blue, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.
6. To print additional notices, press the ***BACK*** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Custom Letter

The custom letter output option allows you to generate a customized form letter for the responsible person(s) for each client returned on your query. To create a new custom letter, refer to the "Creating Custom Letters" section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen, follow these steps:

1. Enter a report name for the custom letter you wish to generate. Click the link with the name of the custom letter. The letter and mailing labels will begin generating immediately.

2. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

   - You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.

   - If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.

3. Once the report name is underlined and appears in blue, your letters and mailing labels are ready. Click on the report name or mailing labels link to view or print the letters in Adobe Reader®.

4. To print the letters, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.

5. To print additional notices, press the ***Back*** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Cards

The card output option allows you to generate a standard (4x6 inch) postcard, printed one card per page. The body of the card includes the client's recommended immunizations and due dates, up to two lines of free text, and a telephone number. To generate reminder cards, follow these steps:

1. Under the Additional Input column for the Cards section of the table, enter:

    - A report name in the appropriate field, if desired.
    - Additional information in the Free Text filed, if desired. You may include a maximum of 275 characters in this field.
    - A telephone number in the appropriate field, if desired.
2. Click on Reminder card, which is underlined and in blue text.
3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
    - You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your cards to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
    - If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.
4. Once the report name is underlined and appears in blue, your cards are ready. Click on the report name to view or print the cards in Adobe Reader®.
5. To print the cards, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.
6. To print additional notices, press the ***BACK*** button on your browser. At the Reminder Request Status screen, click on the

underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

1. Under the Additional Input column for the Labels section of the table, enter a report name, if desired.
2. Click on Mailing Labels, which is underlined and in blue text.
3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   - You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.
4. Once the report name is underlined and appears in blue, your labels are ready. Click on the report name to view or print the labels in Adobe Reader®.
5. To print the labels, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.
6. To print additional notices, press the button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Client Query Listings

The Client Query Listing is produced for the provider organization administrator' records. This report lists every client that was returned in the report query process, along with the phone number and address of every responsible person associated with each client. Insufficient addresses or telephone numbers on this report represent missing information on a responsible person. To generate a Client Query Listing, follow these steps:

1. Under the Additional Input column for the Client Query Listing section of the table, enter a report name, if desired.
2. Click on Client Query Listing, which is underlined and in blue text.
3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

- You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
- If you choose to stay at the Reminder Request Status screen while your request is processing, press ***Refresh*** occasionally to check the status.

4. Once the report name is underlined and appears in blue, your report is ready. Click on the report name to view or print the report in Adobe Reader®.
5. To print the report, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.
6. To print additional notices, press the ***Back*** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

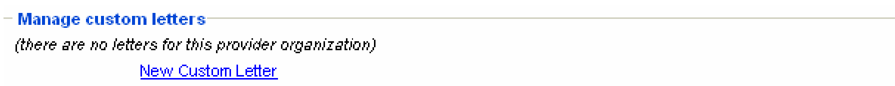
Creating a client query text file

This function is not yet available. When it becomes operational, new VIIS User Manual pages will be sent to you with instructions on how to use this function.

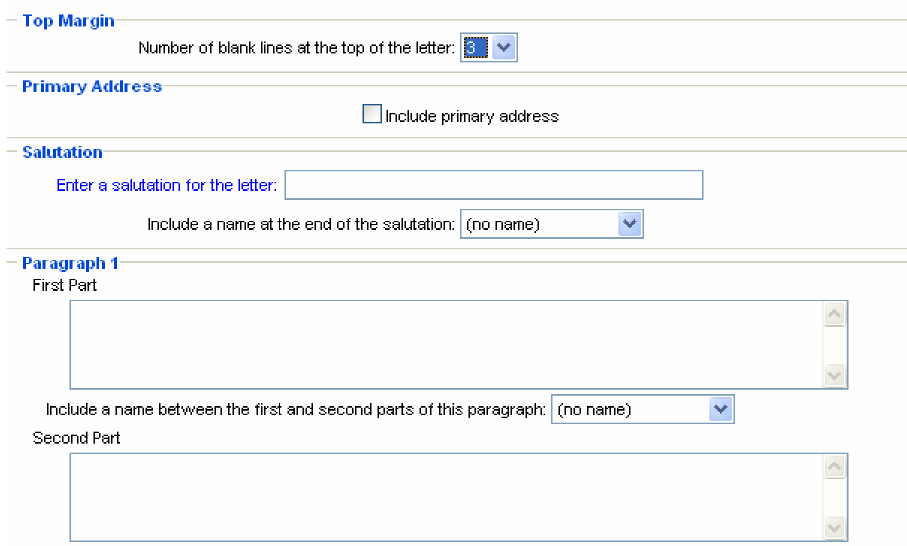
Creating Custom Letters

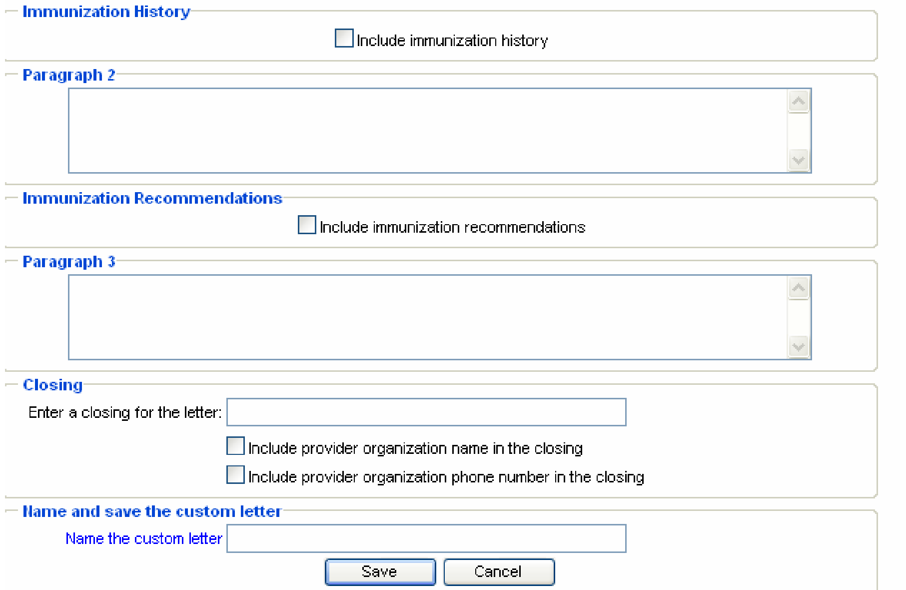
In addition to form letters, VIIS allows users to create and store up to three custom letters to be used for recall/reminders. To create a new custom letter, follow these steps.

1. Click on Manage Custom Letter under Reports on the menu panel.
2. Click the underlined New Custom Letter link.



3. At the Create New Custom Letter screen, enter the following:
   - Top Margin: Choose the number of blank lines you would like at the top of the letter from the pick list provided.
   - Primary Address: Check the radio button to include the organization's primary address at the top of the letter.
   - Salutation: Enter a greeting, then choose a name option from the pick list provided.
   - Paragraph 1: Enter text in this field. If you wish to include a name within the paragraph, enter text up to the mention of the name in the field marked "First part," ending with a single space. Next, choose the name you would like to appear within the paragraph from the pick list (either parent or guardian, client name, or no name). Continue to enter the rest of the text following the name, preceded by a single space, in the field marked "Second Part." If you do not wish to include a name, you may enter all of the first paragraph text in the field marked "First Part" and select "no name" from the name pick list.





- Immunization History: Check the box to include the client' immunization history in the letter.
- Paragraph 2: Enter more text in this field, if desired.
- Immunization recommendations: Check this box to include the immunizations recommended for the client in the letter.
- Paragraph 3: Enter text in this field, if desired.
- Closing: Enter a closing word or statement in this field. If you wish to include your provider organization's name and/or telephone number after the closing, check the appropriate box(es).
- Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, press ***Save***.

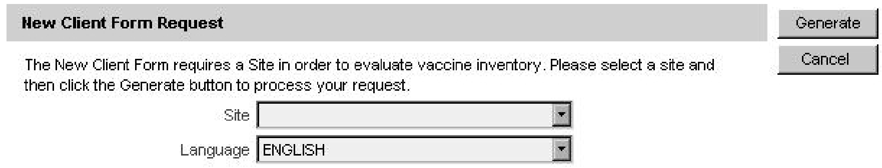
Custom letters may now be generated using the process described in "Reminder/Recall Output Options," located in this chapter.

New Client Form

The New Client Form allows you to print a blank Vaccine Administration Record, which includes a current inventory table for the selected provider site. Use this form to collect information on a client who does not yet exist in the VIIS database. The responsible person' and clinician' signatures are also gathered on this form. To print out a

New Client Form, follow these steps:

1. Click on the Forms menu option at the top of the page.

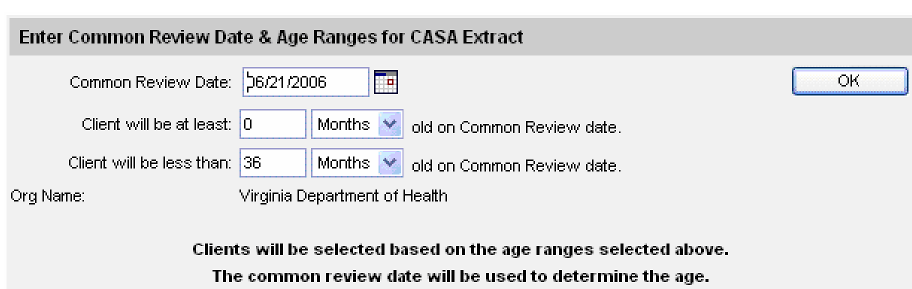


2. At the New Client Form Request screen, pick the site at which the client will be seen so that the appropriate inventory will appear on the record.
3. Choose the language in which out would like the new client form to display
4. Press ***Generate***.
5. The form displays in Adobe Reader®
6. To print the report, press the printer icon on the Adobe® toolbar.
7. Press ***OK*** in the Print dialog box.
8. To return to the New Client Form request screen, press the Back button on your browser.

Clinic Assessment Software Application Extracts

The Clinic Assessment Software Application (CASA) is a tool provided by the Centers for Disease Control and Prevention for assessing immunization practices within a clinic, private practice, or any other environment where immunizations are provided. VIIS is able to extract your organization's immunization information and save it in a format that may be used to import into CASA for analysis. To perform an extract of information for CASA, follow these steps:

1. Click on Request CASA Extract under Reports on the menu panel.

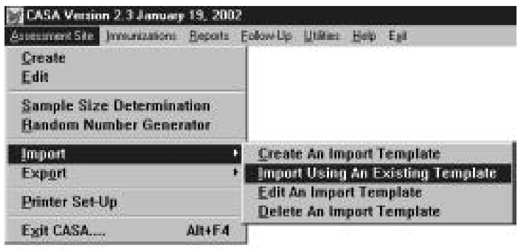


2. Enter a Common Review Date in the MMDDYYYY format or click on the calendar icon to set the date.
3. Enter the minimum age the client must be on the common review date by entering a number and choosing days, months or years from the pick list. This field defaults to 0 months.
4. Enter the age the client must be under on the common review date by entering a number and choosing days, months, or years from the pick list. This field defaults to 36 months.
5. Press ***OK***.
6. A screen will display instructing you to check the status of the extract by going to the Check Request Status screen.
7. Click on Check Request Status under Reports on the menu panel. You may click the ***Refresh*** button at any time to update the status of the report. You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your download to process. To return to check the progress of your download, click Check Request Status on the menu panel.
8. When your extract is complete, it will appear in the status table underlined and in blue text.
9. Double click the name of the underlined CASA file. In the File Download box, press ***SAVE.***
10. In the Save As box,, choose a location where you would like to save the file. We recommend you create a CASA folder to organize the extracts.
11. Press ***SAVE***.
12. A Download Complete box will display. Press ***CLOSE***.
13. Find the location of your saved extract file on your hard drive. Double click on the file. Once this is done, the .exe file automatically creates a new text file (ends in .txt) in the same locations as your .exe file.

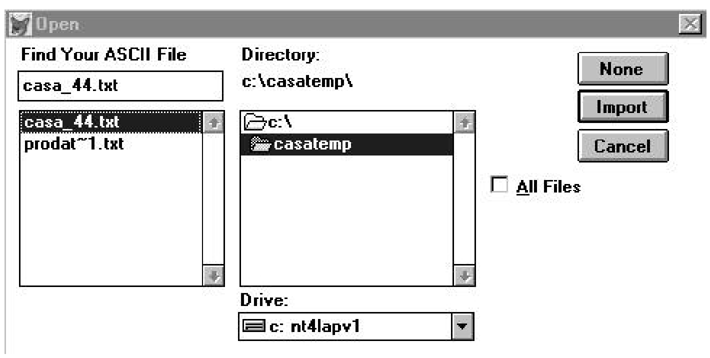
Importing a Text File into CASA

To import your text file into the CASA program, follow these steps:

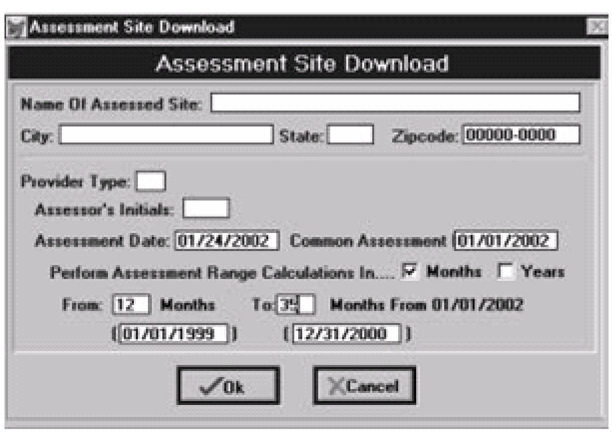
1. Open your CASA program.
2. Select Import from the Assessment Site menu, then select Import Using an Existing Template



3. In the dialog box, choose "VIIS to CASA 2003 "from the scroll-down list. Press ***OK***.
4. In the Open dialog box, locate your newly created CASA text file. Click to highlight the appropriate file (it will end in .txt), then press ***Import***.



5. the Assessment Site Download box, fill in your site, assessment range, common review date, and other information. Press ***OK***.

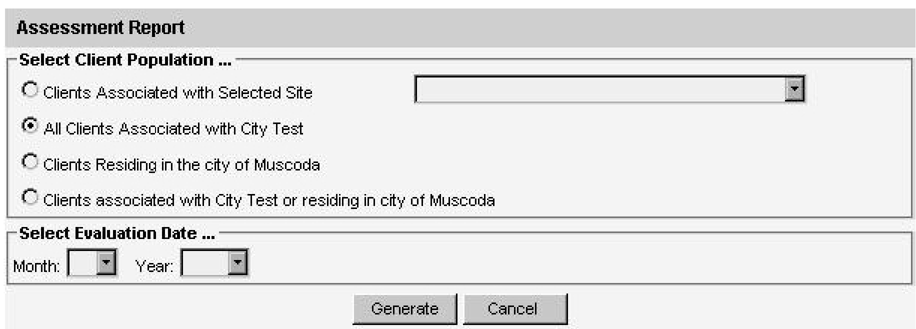


6. In the Importing Empty Records box, press NO.
7. In the Importing Combination Shots box, press NO.
8. Now that your VIIS data is successfully imported into CASA, you will be returned to the main CASA screen.

Assessment Reports

The Assessment Report feature in VIIS compiles an organization' immunization data into a useful format.

1. Click on Assessment Report under the Reports section of the menu panel.



2. Select the client population to be assessed by clicking one of the following:

   - All Clients Associated with Selected Site: Choose this option to view immunization data on all clients associated with the site selected from the pick list at the right of the dialog box.
   - All Clients Associated with <Organization Name>: Choose this option to view immunization data on all clients associated with your organization.
   - All Clients Residing in <City or County Name>: Choose this option to view immunization data on all clients within a given city or county. This option is only available for city or county organizations.
   - All Clients Associated with <Organization Name> or Residing in <City or County Name>: Choose this option to view immunization data on both clients associated with your organization and those residing within a given city or county. This option is only available for city or county organizations.

3. Select the assessment report evaluation date by choosing the month and year from the date criteria pick lists. The evaluation date will always reflect immunization data on the first date of the

selected month. No immunizations administered after the evaluation date will be included in the report.

4. Press ***Generate.***
5. The Assessment Report Status screen will display. Press occasionally to check on the progress of the report. When the report is ready, the job name will appear underlined and in blue.
6. Click the underlined job name. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>. A report listing all clients who have missed a vaccination opportunity will have a job name of: *(*Missed Opps Clients)<Organization Name>-<Date>.
7. Press ***Generate Report.***
8. The form displays in Adobe Reader®.
9. To print the report, press the printer icon on the Adobe® toolbar.
10. Press **OK** in the Print Dialog box
11. To return to the Assessment Report Status screen, press the ***BACK*** button on your browser.

Understanding the Assessment Report

The following is brief overview of the data that is returned on each table within the assessment report.

Age Group	Records Meeting Criteria	Inactive	Records Analyzed
36 -72 Months of Age	631	4	627
24 - 35 Months of Age	178	0	178
12 -23 Months of Age	265	4	261
< 12 Months of Age	902	2	900

Age Group:	This column displays the age ranges used for evaluation.
Records Meeting Criteria:	This column displays the count of selected clients within the age group.
Inactive:	This column displays the count of selected clients within the age group that are included in this report.
Records Analyzed:	This column displays the count of selected clients within the age group that are included in this report.

Immunization Status		
Age(months)	Up-to-Date [1-4] (UTD)	Late [1-4] UTD@Assessment
36 - 72 Months of Age		
72	26.6%	27.0%
24	51.4%	64.1%
12	64.9%	79.4%
7	46.1%	79.4%
24 - 35 Months of Age		
24	47.8%	56.2%
12	62.9%	79.8%
7	46.6%	79.8%
12 - 23 Months of Age		
12	69.0%	80.8%
7	51.3%	80.8%
< 12 Months of Age		
7	56.9%	69.4%

1) UTD by 7 months equals 3 DtaP, 2 HepB, 2 HIB, 2 Polio
2) UTD by 12 months equals 3 DTaP, 2 HepB, 2 HIB,, 2 Polio.
3) UTD by 24 months equals 4 DTaP, 3 HepB, 3 HIB, 1 MMR, 3 Polio.
4) UTD by 72 months equals 5 DtaP, 3 HepB, 4 HIB, 2 MMR, 4 Polio
Late UTD equals the same benchmark for the age group, but it is assessed on the date the report was run.

Age (Months):	This column displays the age of the client on the assessment date.
Up-to-Date (UTD):	This column displays the percent of clients(out of the total number of active clients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report page. For example, a seven-month-old UTD client who has met the criteria will have had three DTaP, two HepB, two HIB, and two Polio vaccinations.
Late UTD @ Assessment:	This column displays the percent of clients (out of the total number of active clients for that age group) meeting the criteria on the date the report was run, rather than on the assessment date.

Age Specific Immunizations Benchmarks							
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1

The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a client should have by the age listed at the left to be determined UTD. This chart is used to create the Assessment of Clients Meeting Age-Specific Benchmarks table.

Assessment of Clients Meeting Age Specific Benchmarks									
UTD Age	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
3 Months	1356	1377	1336		1339	776		1705	42.7%
5 Months	1078	1028	1058		1053	551		1587	29.6%
7 Months	742	970	1005		1010	492		1346	26.4%
9 Months	761	908	917		925	422		1206	27.9%
12 Months	735	817	828		837	355		1066	28.4%
16 Months	290	589	656	605	556	220	496	968	7.2%
19 Months	422	580	624	616	584	181	497	879	11.6%
21 Months	445	563	601	606	584	163	481	837	12.3%
24 Months	468	560	592	606	587	151	484	805	12.5%
72 Months	1	1	1	0	1	0	1	1	.0%

UTD Age:	This column shows the maximum age the client has attained by the assessment date.
Vaccine Columns:	These seven columns display the count of the clients who have met the vaccination criteria by the UTD age.
Total Meeting Age Criteria:	This column gives a count of all the clients who are at least the age listed under UTD Age.
% Coverage:	This column displays the percentage of clients meeting all UTD criteria, out of a total of all clients at least the age listed under UTD Age.

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	199	22.0%
1 Vaccine Needed	135	67.8%
2 Vaccines Needed	31	15.6%
3 Vaccines Needed	14	7.0%
4 Vaccines Needed	19	9.5%

Column 1: In the first row of column one, the age range of clients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by the client is displayed.

Column 2: In the first row of column two, a count is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of clients for this age group who need additional vaccinations to be UTD.

Column 3: In the first row of column three, a percent is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of clients for this age group). Subsequent rows within this column display a percentage of clients for this age group who need additional vaccinations to be UTD.

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates[1]	Beginning > 3 mo. age	31.1%	36-72 mo. age group
		32.6%	24-35 mo. age group
		25.3%	12-23 mo. age group
Drop Off Rates	60-72	17.9%	24 month status[2]
	48-59	19.8%	24 month status
	36-47	31.1%	24 month status
	24-35 mo. age	34.3%	24 month status
	12-23 mo. age	15.3%	12 month status[3]

1) A client who did not receive dose 1 of DTAP by 90 days is considered to have gotten a Late Start.
2) Drop off rate @ 24 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 4 DTaP by 24 Months.
3) Drop off rate @ 12 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 3 DTaP by 12 Months.

DTaP is the equivalent of a DTaP, a DTP or a DT.

Late Start Rates: A client who did not receive one full dose of DTaP by 90 days of age is considered to have gotten a late start. The values in column three of the late start row are the percentages of clients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of clients (column three) in various age groups (column two) who have not gone beyond a12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart.

Clients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number[4]	Per Cent[5]
Clients Missing Birth Dose Of Hep B	299	21.3%

4) Count of Clients who do not have a birth dose and did not complete the 3 dose Hep B series. These clients must be between 6 months and 72 months old on evaluation date and have at least 1 immunization in WIR.
5) Per cent of all clients (between 6 and 72 months old with at least 1 immunization in WIR) who do not have a birth dose and did not complete the 3 dose Hep B series.

The Hep B chart gives the number and percentage of clients who did not receive a birth dose of the Hep B vaccination and who did not complete the three-dose series. Clients evaluated are between six and 72 months old and have at least one immunization in VIIS.

No screen shot available at this time

Age Group on Eval Date: This column lists the age group of the selected clients and the immunization benchmark used for evaluation.

Total Clients in Age Group: This column gives the total number of clients within the age group listed in the first column.

Clients Not Up to Date: This column gives the count and percentage of clients who are not up to date for the benchmark listed in column one.

Missed Op on Last Visit: This column gives the count and percentage of clients who are not up to date and who had a missed opportunity for vaccination on the last visit on or before the evaluation date.

The missed opportunities report lists all your organization' clients who have missed opportunities to be vaccinated. This report lists the client' first and last names, birth date, and date of each missed opportunity by vaccine group.

Ad Hoc Reports

The Ad Hoc Reports function in VIIS allows the user to create customized reports. Filters within the Ad Hoc Reporting function help to narrow a search by date, site, vaccine group, ethnicity, and other factors. City and county public health departments may include in their reports clients associated with their departments or those living within the same city or county.

The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected clients, the other type produces counts, either of clients or of immunizations.

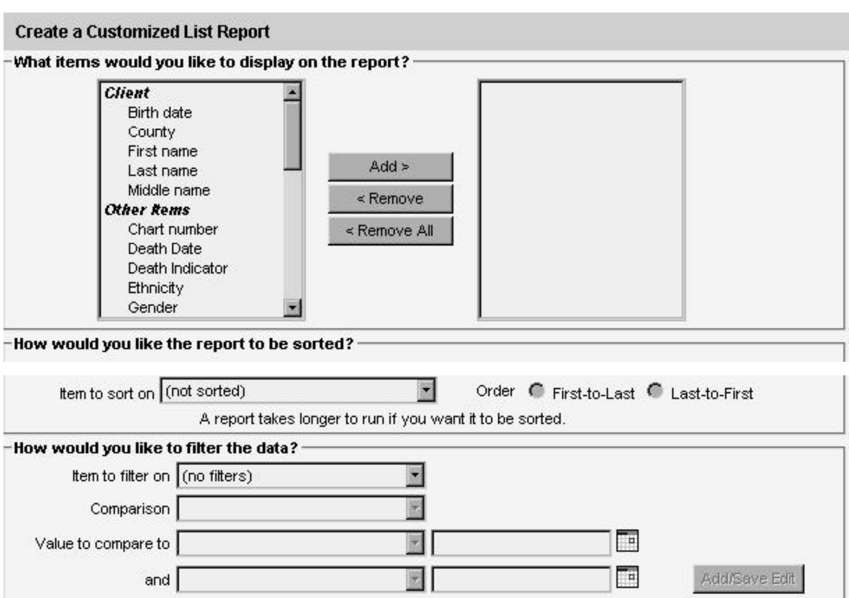
Note: Clients whose information is added or changed on the day the report is run may not appear in the results until the following day.

Ad Hoc List Reports

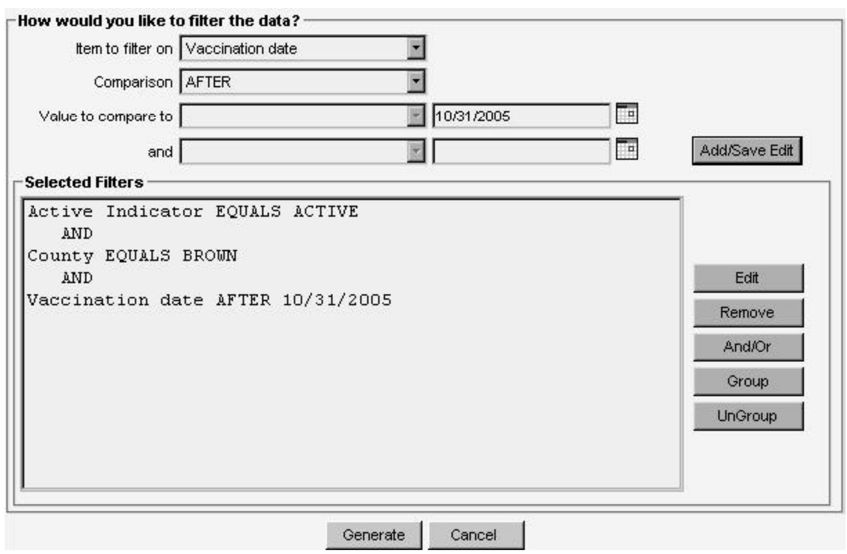
To produce a list of information about selected clients, follow these steps:

1. Click on Ad Hoc List Report under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking on the desired items from the left column (for example, Client Last Name)or by highlighting the item and pressing **ADD**. This will copy the item to the right column and add it to your report.

Filters in VIIS are used to narrow information down so that it answers a user' query or can be used else where. An example of a filter item would be Birth Date Range (Item to filter on) BETWEEN (Comparison)01/01/2004 (Value to compare to) AND 12/31/2004 (And).



3. Select the single item by which you would like to have the report sorted and click on the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the tie it takes to process it.
4. Under “Item to filter on,” select an item that you would like to add as a filter using the pick list provided. For example, “Birth Date Range” could be an item used as a filter.
5. Under Comparison,” select a word from the pick list that best describes the type of comparison you wish to make. For example, “Between” is one comparison operator.
6. Under “Value to compare to,” either choose a value from the pick list in the left field or enter a beginning date in the right field.
7. Under “and,” select another value from the pick list in the left field or enter the ending date in the right field, if applicable.
8. Press ***Add/Save***. Repeat Steps 4-8 for each item you wish to filter.



9. When finished adding filter items, you may do the following:
   - Group them together by highlighting two filter statements and pressing ***Group.***
   - Highlight an AND or OR statement and press ***And/Or*** to change it to an OR or an AND.
   - Highlight a grouped statement and press ***Ungroup*** to ungroup it.
   - Highlight a statement and press to remove it from the selected filters.
   - Highlight a statement and press ***Edit*** to make changes to a statement. Make the necessary changes to the statement in

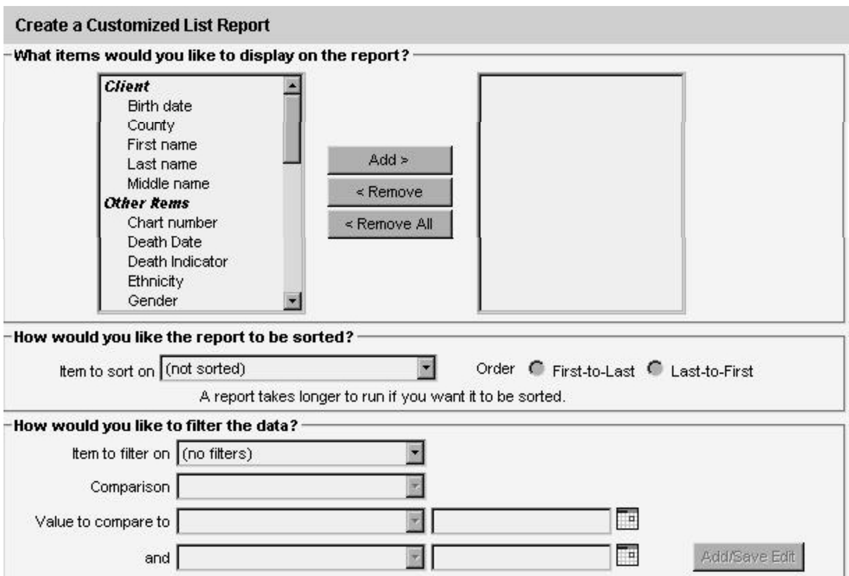
the filtering section of the screen and press ***Add/Save***

10. Press ***Generate***. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Count Report

To produce a count of selected clients or immunizations, follow these steps:

1. Click Ad Hoc Count Report under the Reports section of the menu panel.



2. Select whether Clients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.
3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and pressing ***Add***. This will copy the item to the right column so that it can be used in your report.
4. Under “Item to filter on” select an item that you would like to add as a filter using the pick list provided. For example, “Birth Date Range” could be an item used as a filter.
5. Under “Comparison,” select a word from the pick list that best describes the type of comparison you wish to make. For example, “Between” is one comparison operator.
6. Under “Value to compare to,” either choose a value from the pick

list in the left field or enter a beginning date in the right field.

7. Under “and,” select another value from the pick list in the left field or enter the ending date in the right field, if applicable.

8. Press ***Add/Save***. Repeat Steps 4-8 for each item you wish to filter.

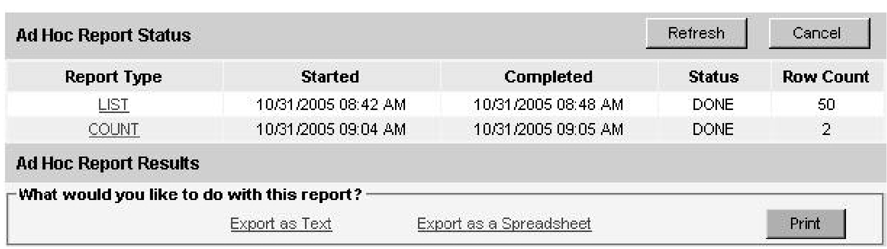
9. When finished adding filter items, you may do the following:

   - Group them together by highlighting two filter statements and pressing ***Group.***
   - Highlight an AND or OR statement and press to change it to an OR or AND.
   - Highlight a grouped statement and press ***Ungroup*** to ungroup it.
   - Highlight a statement and press ***Remove*** to remove it from the selected filters.
   - Highlight a statement and press ***Edit*** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and press ***Add/Save***

10. Press Generate. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you press ***Generate*** on the Ad Hoc Count or Ad Hoc List Report screens, or you may access the status screen by clicking Ad Hoc Report Status under the Reports section of the menu panel.



2. Press ***Refresh*** occasionally to check the status of the report. Once the underlined report number appears, click it. The report will display directly on this screen

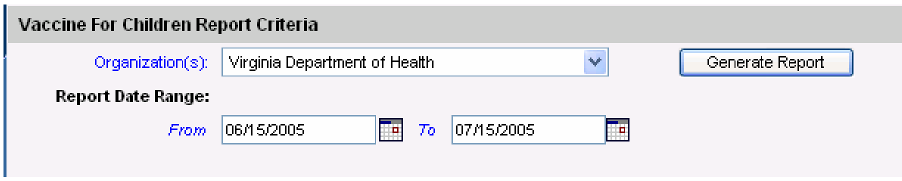
3. If you wish to export the file, select the appropriate link.

4. If you wish to print the report, press ***Print***. The screen will display without the VIIS menus, allowing you to use your browser’ print function.

Vaccines for Children Reports

The Vaccines for Children (VFC) Report details the number of clients that are vaccinated by your organization for each eligibility type for a specified date range. To generate a VFC Report, follow these steps:

1. Click Request VFC Reports under the Reports section of the menu panel.



2. Select the organization name from the pick list.
3. Enter a From date under the Report Date Range using the MMDDYYYY format.
4. Enter a To date under the Report Date Range using the MMDDYYYY format.
5. Press ***Generate Report.***
6. The form displays in Adobe Reader®.
7. To print the report, press the printer icon on the Adobe® toolbar.
8. Press ***OK*** in the Print dialog box.
9. To return to the Vaccines for Children Report Criteria screen, press the ***Back*** button on your browser.

Understanding the Vaccines for Children Report

The following section explains the rows and columns within the VFC report. The report only displays vaccines administered from the organization's inventory.

Vaccines for Children by Provider

For Dates Between 12/01/2006 and 12/31/2006

Report run on: 01/24/2006 02:05 PM

Page 1

Angel Of Hope Clinic - 26689004

	Eligibility Not Det/ Unknown		Insured, Vaccine covered		Medical Assistance, including BadgerCare		No Insurance		Native American/ Alaskan Native		Insurance, No vaccine		Medicare			
	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Sum of Immunizations	Sum of Distinct Clients
<1	0	0	0	0	0	0	0	0	0	0	3	2	2	1	5	3
Annualized	0	0	0	0	0	0	0	0	0	0	35	24	24	12	59	36
1-6	1	1	0	0	1	1	0	0	7	4	0	0	1	1	10	7
Annualized	12	12	0	0	12	12	0	0	83	47	0	0	12	12	118	83
7-18	0	0	4	1	8	5	0	0	4	2	0	0	0	0	16	8
Annualized	0	0	47	12	94	59	0	0	47	24	0	0	0	0	188	95
19+	3	1	1	1	6	3	4	2	3	1	0	0	0	0	16	8
Annualized	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

The rows on the report break down the immunizations and clients by age in years. A client who receives a vaccination when he or she is six years and 11 months old will be included in the 1-6 age group.

Row	Description
< 1	This row includes doses given to clients who were under one year of age at the time the dose was administered.
1-6	This row includes doses given to clients who were from one to six years of age at the time the dose was administered.
7-18	This row includes doses given to clients who were from seven to 18 years of age at the time the dose was administered.
19+	This row includes doses given to clients who were 19 years of age or older at the time the dose was administered.
Annualized	VIIS computes annualized estimates by using actual immunization and client counts in each age group and applying a multiplier to estimate a yearly amount. For example, if a report was run for 01/01/2006 to 01/31/2006, the number in the annualized row will be roughly 12 times the actual counts.

The columns on the report break down the immunizations and clients by eligibility.

Column	**Description**
Eligibility Not Det/	The immunization is associated with a Unknown client who does not have any

	eligibilities at all or has Eligibility Not Det/Unknown in his or her client record.
Insured, Vaccine Covered	The immunization is associated with a client who has Insured Vaccine Covered in his or her client record.
No Insurance	The immunization is associated with client who has No Insurance in his or her client record.
Native American/ Alaskan Native	The immunization is associated with a client who has Native American/Alaskan Native in his or her client record.
Insurance, No Vaccine	The immunization is associated with a client who has Insurance, No Vaccine in his or her client record.
Medicare	The immunization is associated with a client who has Medicare in his or her client record.

Sub columns	**Description**
Imms	This sub column counts the number of immunizations given to clients with this eligibility within the date range specified.
Distinct Clients	This sub column counts the number of distinct clients associated with the immunizations given for this eligibility within the date range specified. *Note:* A single client who received three doses would contribute +3 to the Imms column but only +1 to the Distinct Clients column.

Totals include counts by eligibility, age group, and grand total.

Total Field	**Description**
Total by Eligibility	The total cells in the bottom row of the report represent the total count of immunizations or distinct clients for the given eligibility, regardless of the age at which the dose was administered.
Sum of Immunizations	The second-to-last column of the report shows a count of the number of immunizations given in each age category, regardless of eligibility.
Sum of Distinct Clients	The last column of the report shows a

count of the number of distinct clients who received immunizations within each age category, regardless of eligibility.

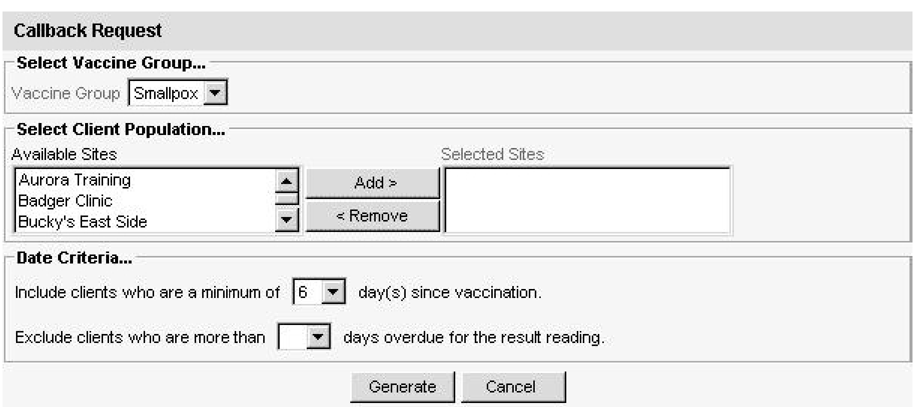
A dose given to a client with multiple eligibilities will count in only one column, according to rank. A rank of “1” is the highest, and a rank of “7” is the lowest. For example, if a client has both Native American and Medicare eligibility, all of that client’s immunizations will count in the Native American column, because the Native American (ranked 2) eligibility category has a higher rank than Medicare (ranked 5).

Eligibility	Rank
Insured, Vaccine Covered	1
Native American/Alaskan Native	2
Medical Assistance	3
Insured, No Vaccine	4
Medicare	5
No Insurance	6
Eligibility Not Det/Unknown	7

Callback Lists

To generate a take response reading callback list, follow these steps:

1. Click Request Callback under the Reports section of the menu panel



2. Select the vaccine group using the pick list.
3. Select the site(s) for which you wish to generate callbacks by high lighting each desired Available Site and pressing. To remove a selected site, highlight the site under Selected Sites and press ***Remove.***
4. Enter the minimum number of days that must elapse following the vaccination under Date Criteria.

5. Enter the number of days past which you wish to exclude clients from the callback list.
6. Press ***Generate.***
7. The callback list will display.

Data Exchange

In this chapter:

Data Exchanges Through VIIS
Organization Extracts

Data Exchanges Through VIIS

The data exchange feature of VIIS gives you the capability to automatically exchange immunization batch files. Only VIIS users with roles of "Data Exchange," "HMO User," or "Administrator" will be able to perform data exchanges. HMO users will need to follow the steps in the "HMO Data Exchanges" section of this chapter.

Provider Organization Data Exchanges

Prior to performing a data exchange, your provider organization will need to contact the VIIS project manager and arrange for your organization to be set up to perform data exchanges. You will need to provide the following information regarding the exchange:

- File format: Indicate Health Level 7 (HL7) or Flat File.
- Direction of data: Indicate whether the data will be bidirectional, provider organization to VIIS, or VIIS to provider organization.
- Type of transmission: Indicate whether the exchange will be a test or an actual production transfer.

To perform a data exchange, follow these steps:

1. Click on Exchange Data under Data Exchange on the menu panel. Depending upon the type of file format and direction of data you will be using, one or more of the following fields will display:

- Job Name: Fill in a name for the data exchange, if desired. If left blank, VIIS will use the current date for a job name.
- Client File Name: This field is required if you have chosen "bidirectional" or "provider organization to VIIS" as a data direction, and your file format is Flat File. Press Browse; to select the appropriate Client File Name.
- Immunization File Name: This field is required if you have chosen "bidirectional" or "provider organization to VIIS" as a data direction, and your file format is Flat File. Press Browse to select the appropriate Immunization File Name.
- Comment File Name: This optional field will appear if you exchange data via Flat File format and have chosen "bidirectional" or "provider organization to VIIS" as a data direction.
- HL7 File Name: This field is required for users who are exchanging data using the HL7 file format. Press Browse to select the HL7 file you wish to upload.

2. Press the Upload or Request Download button on your screen, whichever is displayed.

3. The Exchange Data Result screen will display. This screen will list the files that were uploaded using "bidirectional" or "provider organization to VIIS" data directions and will confirm or provide the job name to the user.

4. Press Check Status.

5. The Exchange Data Status screen will display. This screen will contain the job name, user name, exchange data date, process start and end date , and status of the current job.

6. Press REFRESH periodically to check the status of the job.

7. When a job is completed, the job name will appear underlined and in
blue. Under the status column, one of three messages may appear.
   - Complete: This message indicates the job has completed processing.
   - Error: This message indicates the job could not be processed because of formatting errors.
   - Exception: This message indicates that the job could not be processed because of an internal system error.

8. Click on the underlined job name.

9. If the job completed successfully, the Job Detail screen will display.

This screen contains three sections:

- Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "VIIS to provider organization" download files. Click on the blue, underlined download name to download the file.

- Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).

- Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.

10. If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange

data could not be processed, contains the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

HMO Data Exchanges

Prior to performing an HMO data exchange, your HMO will need to contact the VIIS project manager and arrange for your organization to beset up to perform data exchanges. You will need to provide the following information regarding the exchange:

- *File format:* Indicate HL7 or Flat File.
- *Type of transmission:* Indicate whether the exchange will be a test or an actual production transfer.

To perform an HMO Data Exchange, follow these steps:

1. Click on Submit HMO Data or Submit HMO Query under the Data Exchange menu option. Depending upon the selection made and the type of file format you are set up to use, one or more of the following fields will display:
   - Job Name: Fill in a name for the data exchange, if desired. If left blank, VIIS will use the current date for a job name.
   - Client File Name: This field is required if your file format is Flat File. Press Browse to select the appropriate Client File Name.
   - Immunization File Name: This optional field will appear if you ex change data via Flat File format. Press Browse to select the appropriate Immunization File. The Immunization File must contain at least one immunization.
   - Comment File Name: This optional field will appear if you exchange data via Flat File format.
   - HL7 File Name: This field is required for users who are exchanging data using the HL7 file format. Press Browse to select the HL7 file you wish to upload.
   - Query File Name: This field is required for users who are running an HMO query. Press Browse to select the appropriate query file. For the format of the HMO query, please see the HMO Query Specifica-tion.
2. Press Upload.
3. The Exchange Data Result screen will display. This screen will list the files that were uploaded and will confirm or provide the job name to the user.
4. Press the Check Status button.
5. The Exchange Data Status screen will display. This screen will contain the job name, user name, exchange data date, process start and end date, and status of the current job.

6. Press Refresh | periodically to check the status of the job.
7. When a job is completed, the job name will appear underlined and in blue. Under the status column, one of three messages may appear:
    - Complete: This message indicates the job has completed processing.
    - Error: This message indicates the job could not be processed because of formatting errors.
    - Exception: This message indicates that the job could not be processed because of an internal system error.
8. Click on the underlined job name.
9. If the job completed successfully, the Job Detail screen will display. For jobs created from the Submit HMO Data menu option, these sections will display:
    - Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "VIIS to provider organization" download files. Click on the blue, underlined download name to download the file.
    - Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).
    - Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.

For jobs created using the Submit HMO Query menu option, the following sections will display

- Download Files for: <Job Name>: Contains the Demographic File, Immunization File, and Exception File, all available for download by clicking on the underlined file name.
- Download Log for: <Job Name>: Contains information regarding activity of the download files.

10. If the job did not complete successfully, the Job Error screen will display. This screen contains an explanation of why the exchange data could not be processed contains the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

Organizational Extracts

The organizational extract feature allows data exchange users to generate a report showing clients selected by organization, county, vaccine group, client status, and date ranges.

To generate an organizational extract, follow these steps:

1. Click on Organizational Extract under Data Exchange on the menu panel.
2. Select Organization ID(s): *This section will only display for providers with child organizations entered in VIIS.*

    - All Clients for Parent and All Child Organizations: Click this option to request that VIIS return all clients in parent and child organizations.
    - All Clients for Parent Organization: Click this option to request that VIIS return clients associated only with the parent organization.
    - All Clients for These Child Organizations: Click this option to re quest that VIIS return all clients in selected child organizations. If you choose this option, select the desired child organization(s) by double clicking the organization name or by highlighting the name and pressing ADD.
3. Select County(s): Indicate whether you wish to return clients from all counties or only those clients with residence within the counties selected. If you choose to return only clients from selected counties, choose the desired counties by double clicking the organization name or by highlighting the name and pressing Add j.
4. Select the Vaccine Group(s): Indicate whether you wish to return all clients regardless of vaccine history, or return only those clients that have had an immunization from one of the selected vaccine groups. If you choose to return only clients with immunizations from selected vaccine groups, choose the desired vaccine group(s) by double clicking the group name or by highlighting the name and pressing ADD.

5. Select Date Criteria:

    - No Date Criteria: Click this option to indicate that you want VIIS to return clients regardless of the date the client or immunizations were last updated.
    - Vaccine Administration Date Range: Click this option to indicate that you want VIIS to return only clients that have had an immunization within the date range entered. Once the option is selected, two text boxes with calendar controls will appear to the right of the line. Enter dates in the MMDDYYYY format in both the From and To text boxes.

- Birth Date Range: Click this option to indicate that you want VIIS to return only clients with a date of birth within the date range entered. Once this option is selected, two text boxes with calendar controls will appear to the right of the line. Enter dates in the MMDDYYYY format in both the From and To text boxes.

Client Update Date Range: Click this option to indicate that you want VIIS to return only clients that have been updated within the date range entered. Once the option is selected, two text boxes with calendar controls will appear to the right of the line. Enter dates in MMDDYYYY format in both the From and To text boxes.

6. Select Client Status:
   - All — Indicate that you want all active, inactive, and permanently inactive/deceased clients to be returned by clicking this option.
   - Active — Indicate that you want VIIS to return only active clients by clicking this option.
   - Inactive — Indicate that you want VIIS to return clients with an inactive association by clicking this option.
   - Permanently Inactive/Deceased — Indicate that you want VIIS to return only clients with a permanently inactive/deceased association by clicking this option.
7. Select Extract Format:
   - Job Name — Enter a name for the extract job, or leave this field blank and VIIS will assign an extract name using the current date.
   - VIIS Flat File Format — Click on this option to select flat file format. VIIS defaults to this format if no other option is selected.
   - HL7 2.3.1 Transaction Format — Click on this option to select this HL7 format.
   - HL7 2.4 Transaction Format — Click on this option to select this HL7 format.
8. Press Generate).
9. The Exchange Data Status screen will display. Press Refresh periodically to check status. When the organizational extract is complete, the job name will be underlined and in blue.
10. Click on the extract job name.
11. Click on the Client File, Immunization File, or Comment File link at the Job Detail screen.

12. Press Back on your browser to return to the Job Detail screen.

School User

In this chapter:

Finding Student Screen

The **Find Student** screen is used to search and locate any school student existing in the VIIS system using predetermined sets of search criteria.

There are two main sections used in the **Find Student** screen.

- Functionality
- Search Results

Functionality – Search Criteria
Listed below are the main items used to search for a student in VIIS.

- Student Name Search
- Mother's Name Search
- Birth Date Search
- Gender Search
- Phone Number Search

- **Student Name Search**
  In order to locate a student in VIIS using his or her name, a certain portion of each of the student's Last Name and First Name must be entered into the respective information fields as described below. Middle Name can also be used but only along with last or first name or both.

  Last Name - At a minimum, the first three characters of the student's last name must be entered. The system will then search the entire database for possible matches employing the search information entered.

  A search can be executed using less than three characters for the Last Name. In this case, the system will search the database only for students whose Last Name *exactly* matches the search information entered for Last Name.

  First Name - At a minimum, the first two characters of the student's first name must be entered.

  Middle Name - There is no minimum character entry for the middle name field. The middle name is only functional when used in conjunction with the student's last or first name or both.

  Notes: For quicker, more precise searches, entire Last Names and First Names should be used whenever available. The middle name will not function if used with any criteria other than first and last name, for example the birth date.

Searches executed using very general search criteria information may cause the search engine to hit the threshold limit of 75. The system will then notify you to enter more criteria for the search.

- **Mothers Name Search**
  In order to locate a student in VIIS using his or her Mother's Maiden Name, a certain portion of each of the Mother's Maiden Last Name and Mother's First Name must be entered into the respective information fields as described below.

  Mother's Maiden Last - At a minimum, the first three characters of the Mother's Maiden Last name must be entered.

  Mother's First Name - At a minimum, the first two characters of the Mother's First Name must be entered.

  Notes: The Mother's Name Search can be used independently or in conjunction with the Student Name Search. It is recommended this search only be used when incorporating at least one other set of search criteria, as system performance will suffer severely when using it by itself. If a Student Name Search is being executed then some portion of the Mother's Maiden Last, Mother's First Name, or both may be filled in along with the student name search information.

- **Birth Date Search**
  In order to locate a student in VIIS using his or her Birth Date, the criteria must be entered as described below.

  Birth Date - A valid date between 01/01/1880 and the current date, in the format MM/DD/CCYY, must be entered.

  Notes: The search engine will return all students whose corresponding birth dates *exactly* match the date entered. The Birth Date Search can be used independently, but is recommended that it only be used in conjunction with at least one other set of search criteria, such as Last Name. Typically there may be hundreds of students born on that particular day which will cause the search engine to hit the threshold limit.

- **Gender Search**
  The Gender Search can only be used in helping to locate a student in VIIS when used in conjunction with one or more other set(s) of search criteria.

Gender - Select one of the three radio buttons, 'M' for male, 'F' for female, or 'N/A' for not available.

Notes: If nothing is selected, the Gender Search will always default to 'N/A'. The search engine will then execute its search using any other search criteria entered, independent of any student's gender in the system. The N/A selection can also be used to search for students who have no specific gender selected, which would mean they have 'Unknown' selected as their gender.

- **Phone Number Search**
  In order to locate a student in VIIS using his or her Responsible Person's Phone Number, the criteria must be entered as described below.

  Phone Number - A valid seven-digit Phone Number must be entered, broken down by the second and third information fields after Phone.

  Notes: The search engine will only return students whose corresponding Responsible Person's Phone Number *exactly* matches the Phone Number entered. An Area Code can be entered in the first information field after Phone as an additional means to narrow the search, but is never required. The Phone Number Search can be used independently or in conjunction with other search criteria.

Once you have entered all your criteria for the search, click on the button to execute the search. Results are described below.

Search Results

- **Exact Student Match**
  An Exact Student Match means the search engine returned only one student. When this occurs, the **Student Immunization History** screen is then displayed containing all of the relevant information regarding the student found. An Exact Student Match will usually occur when the search criteria entered contains information inherently specific to a particular student.

  List of Possible Matches

  A List of Possible Matches means the search engine returned more than one, and less than or equal to 75, possible student matches.

  All possible student matches returned are then displayed in a table. The student result table is sorted alphabetically by Last

Name. Other relevant information is also included in the table for each student.

Using the information displayed for each of the students in the table, the student can be selected by clicking on the Last Name. The **Student Immunization History** screen is then displayed containing all relevant information regarding the student selected.

- **Threshold Limit**

  When the search engine is executing a search in the database, it begins to accumulate students in memory who are to be considered as possible matches from the search criteria entered. If the number of students exceeds 75 available matches, then no students will be listed for further selection. Instead, the following message will display:

  "XX students were found. Please refine your search criteria to limit your student list."
  (Where XX is the total number of possible students found in the search.)

  This threshold limit occurs to restrict the extremely long lists of possible students to choose from.

  In the event a threshold limit is encountered while executing a student search, the scope of the search must be narrowed. Revisit the search criterion that was previously used, and add additional information available for the student. Be sure to observe the search criteria restrictions listed above in the Functionality - Search Criteria section.

Student Immunization History Screen

The **Student Immunization History** screen displays a student's immunization history and provides immunization recommendations based on the assigned tracking schedule. From this screen, you are also able to select and add the student to a specific student list. This will allow you to run reports for that student.

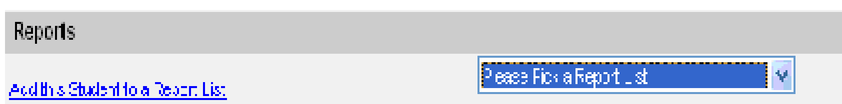
There are three main sections used in the Student Immunization History screen.

- o Student Information
- o Student Immunization History
- o Recommended Vaccinations

Student Information

The **Student Immunization History** screen displays a student information header at the top of the page. This header includes student name, selected tracking schedule, as well as other student-distinct information.

One main piece of functionality in this section is the 'Add to Report List' drop down box. With this drop down box you can select a list you want your student to be added to so you can run a report for that student. Here is what the drop down box looks like:



To add the student to a list click on the drop down box, then select your list from the available options. Then click the Add this student to a Report List link. A message will display saying 'Student has been added to the selected list'.

Note - Once a student has been added to a list the student cannot be added to the same list again until removed from that list. The student can however be added to more than one list.

The information contained in the header can also be used to confirm that you have located the correct student when you were brought to the Student Immunization History screen following a student search on the Find Student screen.

Student Immunization History

The **Student Immunization History** table lists all vaccinations the selected student has received to date. Immunizations listed in the table are ordered alphabetically first, then by 'Date Administered'. The table columns are defined as follows:

Vaccine Group -This column lists the vaccine group name for each immunization received.

Date Administered - This column gives the actual day the student was given the vaccine.

Series - Validates vaccine administration per the CDC/ACIP schedule and denotes the sequence number within the immunization series.

Trade Name - This column displays the trade name of the vaccination received.

Note - The student's age shows in a solid blue field between the student immunization history and before the recommendations. Here is an example of what it looks like:

Recommended Vaccinations

The recommended vaccinations and corresponding dates for the selected student reside in a table titled ‘Vaccines recommended By Selected Tracking Schedule’ at the top of the table. The vaccine group list appearing in this table represents all vaccinations included in the tracking schedule assigned to this student. The table columns are defined as follows:

Vaccine Group - This column gives the vaccine group name.

Earliest Date - This column displays dates which note the earliest date the student could receive the corresponding immunization.

Recommended Date - This column displays dates which note the date that the student is recommended to receive the corresponding immunization.

Overdue Date - This column displays dates which note the date that the student is past due for the corresponding immunization.

The dates found in the **Vaccines Recommended by Selected Tracking Schedule** table can be shaded with color for emphasis. The colors applied to the dates within the columns are defined as follows:

Yellow will only be applied to those dates in the **Earliest Date** column. Yellow shading indicates that today’s date is equal to or past the earliest date, and is before the recommended date. Therefore, the student could receive the immunization now.

The color green will only be applied to those dates in the **Recommended Date** column. Green shading indicates that today’s date is equal to or past the recommended date, and is before the overdue date. Therefore the immunization is recommended to be administered now.

The color blue will only be applied to those dates in the **Overdue Date** column. Blue shading indicates that today's date is equal to or past the overdue date and before the latest date. Therefore the patient is overdue for the immunization and should receive it as soon as possible.

Maximum Age Exceeded

Reflects whether a student has exceeded the maximum age to receive a specific vaccine. For instance, if a student has already reached the age of 5 and hasn't completed the Pneumococcal series, then the recommendation for Pneumococcal at the bottom of the student immunization history will show "Maximum Age Exceeded".

Maximum Doses Met Or Exceeded For Vaccine Group

Indicates the maximum number of doses that can be administered for the specified vaccine series.

Completed Early

Indicates that per the age of the student at the time the vaccines were administered the student has completed the series early

Complete

The pink shading will only be applied to an immunization series that has been completed according to the CDC/ACIP schedule. The pink shading will span across all columns in the table.

Information about printing an immunization record

The **Student Immunization History** screen displays the information held in the VIIS database for the selected student. It is possible to print this screen, but if you do print screens, please note the following:

The Printer Icon or File>Print in the browser isn't a VIIS system function, but rather a function of Internet Explorer and Netscape.

Due to security issues, to correctly print the screen simply follow the steps below:

1. Click on File>Page Setup
2. In Internet Explorer look at the 'Footer' section of 'Headers and Footers', remove any entry or "code" in the 'Footer' field.
3. In Netscape look at the Header section, remove the checkmarks for "Document Title" and "Document Location (URL)".
4. Click Ok. Now you are ready to print.
5. Open up the Student record you want to print, click on the Print button in VIIS (under the Add button).

6. Once the record comes up in the print window, click on the print icon or File>Print in your browser.

Note - This setting should remain on your computer but you may have to change it on others.

Manage List Screen

The **Manage List** screen is used to create new and manage existing school user student list(s) to be used for reporting purposes. A maximum of ten lists can be created by each school. This is noted at the top of the screen.

There are two main sections used in the Manage List screen.

- Manage List
- Report List

Manage List
This section is used to add on new list names that are to be assigned to specific students on the Student Immunization History screen. The 'New List Name' text field is displayed, you can enter in a new name and save it as a new list for use with reporting.

Report List
This section displays a table of all lists added on by the school in alphabetical order. Information contained within the table is described below.

List Name - This column displays the name given to the list by the creator of the list. If you click on the name you can view a detailed display of your students within the list on the Detail List screen.

Last Updated Date - This column displays the date the list was last updated.

Student Count - This column denotes the count of students within the particular list. The count is determined by how many students you have assigned to that list.

Delete - This column displays a delete button for each list. If you click on the delete button you can delete the desired list.

Note - Once you delete a list you cannot reverse the deletion, in other words if you make a mistake you will have to add all your students back on. Deleting a list removes all students from the list. There is no way to recover a deleted list!

Functionality

Entering a new student list.

1. To add a new list begin by entering in a name for your list in the ‘New List Name’ text field.
2. Next click the Save button and the list will be added.
3. The message will appear at the top, “The list has been created successfully.”

Opening the Report/Student List Screen.

1. Click on a list name for the list you wish to view.

2. You will be taken to the Report/Student List screen where you can view your student list. Further explanation can be found on the Report/Student List page.

Removing a list.

1. Click on the Delete button to the right of the list.

2. When the Delete button is clicked you will be given a prompt “Are you sure you want to delete this list?” Your option is either Ok or Cancel.

3. Clicking on Ok will delete the list and remove it from the Manage List screen. Clicking Cancel will cancel the delete and return you to the Manage List screen.

Button and Link Functionality

- List Name Link - Clicking on a list name will open the **Detail List** screen for that list. Here you can view the student's that have been added to the list and run reports. Further functionality associated with your list reports is explained on the **Detail List** screen.
- The Save button is used for adding a new list for your students. To add on a new list begin by entering in a name for your list in the 'New List Name' text field. Next click the Save button and the list will be added. The message will appear at the top, "The list has been created successfully."
- Each list can be deleted by clicking on the Delete to the right of the list. When the Delete button is clicked you will be given a prompt "Are you sure you want to delete this list?". Your option is either Ok or Cancel. Clicking on Ok will delete the list and remove it from the Manage List screen. Clicking Cancel will cancel the delete and return you to the **Manage List** screen.

Report Student List Screen

The **Report/Student List** screen is used to view students added to your school list, and run reports for the students in the list. You can also view a student's history and remove a student from your list.

There are two main sections used in the **Report/Student List** screen.

- Student List
- Reports Available for School

Student List

This section is for viewing student immunization history, and to remove a student from your list if you wish to do so. Information contained within the student list table is described below.

> ***Delete:*** If you wish to remove a student from your list you use the Delete column to do so. Place a checkmark in the box beside the student(s) you wish to remove. You can remove as many students as you like at one time by checking multiple students. Next click on the Delete button. Your selected student(s) should then be removed.
>
> ***Last Name:*** This is the last name for the student. It is also used as a link back to the **Student Immunization History** screen. Click on this link and you will be taken to the history screen for the student.
>
> ***First Name:*** This field displays the first name for the student.
>
> ***Middle Name:*** This field displays the middle name for the student.
>
> ***Birth Date:*** This field displays the date of birth for the student.

Reports Available for Schools

This section provides three reports for your students within the list. The different reports are explained in detail below.

Student List - This report displays the name and date of birth for each student on the list sorted alphabetically by last name.

Student Immunization History List - This report displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.

Important Note –
When requesting the immunization due report you will be taken to a screen where you can enter in criteria used for the report. The criteria for this report is explained below.

Selecting Vaccine Groups
Choosing vaccine groups allows you to single out any given vaccines within the selected tracking schedule. If the student is overdue for any of the selected vaccine groups according to the selected tracking schedule, then he or she will be included in the school report outcome, given all other report criteria is met.

1. Within the *'Select the Vaccine Group(s)*' section, select the **'Use All Vaccine Groups**' option, or select the**' Use Vaccine Groups Selected**' option.
2. If the 'Use vaccine Groups Selected' option is selected, choose the vaccine groups to include.

Scroll though the vaccine group list and either double click on the desired vaccine group name, or click on the vaccine group name and then click the **Add** button. All selected vaccine groups will appear in the right list box in green font.

3. To remove any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box, or click on the selected vaccine selected vaccine group name from the right list box and then click the Remove button.

Selecting Dates
Date criteria can be entered as a Target Date Range as described below.

Target Date Range
When these dates are specified, the report will only return those student's that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.

Enter the Target Date Range in the From and To text boxes in the format M/DD/CCYY, or click on the calendar icon to set the date.

For either date range, the From date, To date, or both dates can be left unspecified, described as follows:

If the To date is unspecified for the Target Date Range, the report date range will include the From date up to and including today's date.

Immunization Due - This report displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name. ***Important Note***

Functionality

Generating a report for your student list.

1. Click on the report name for the report you want to run.
2. You will be taken to the **Check School Report** screen where you can view the status of your report selection. **Note** - *The student list report will open directly without having to go through the status screen.*

Viewing a student's immunization history.

1. Click on the last name for the student's history you want to view.
2. The **Student Immunization History** screen will open displaying the history.

Removing a student from your list.

1. Place a checkmark in the delete column next to the student you wish to remove. **Remember:** ***you can select and delete multiple students at one time.***
2. Click on the Delete button and you will be prompted with a confirmation to delete.
3. Once you have confirmed a message will display: "**The list has been updated successfully.**" and your student(s) should be removed.

Button and Link Functionality

- Student Last Name Link - Clicking on a student's last name will open the immunization history screen for that student.
- The **Delete** button is used to delete student(s) from your list. Select the student(s) you want to delete, then click the **Delete** button.
- Clicking on the **Cancel** button will not save anything changed and will take you back to the **Manage List** screen.

Check School Report Screen

The **Check School Report** screen is used to display and/or determine the status of a report request. The screen is separated into two sections.

- School Report Job Status
- School Report Status

School Report Job Status

This section displays date and time a report was started and completed, the overall status in percentage, the number of students returned, and the target date range if one was specified. **Note 1**

School Report Status

This section display's reports generated from the Report/Student List screen. It contains the name of the report (i.e. History Report 06-27-2002 09:42:55), the type of report, the date and time the report was requested, what time it started, and the status. Your reports will be listed here sorted by time generated with the latest report at the top. **Note 2**

To get the latest update on all the requests listed in the table, click on the button. This will get the most current status for each request from the VIIS database. **Note 3**

As soon as the report name appears as a hyperlink or the 'Status' displays 'Ready', it has completed processing and is ready for viewing. To view the report, simply click on the desired report name hyperlink. (This process can also take some time depending on the size of the report) The selected report will automatically be displayed using the Adobe Acrobat Reader. If there is a problem viewing your report please contact the VIIS Help Desk.

At any time, click the button to return to the screen you were previously on.

- If both dates are left unspecified for the Target Date Range, then today's date will be entered for both From and To.

Note 1 - You can only ever have one job listed in this section. There is no functionality with the job listing other than to display the status of your report. Once you run a new report your previous job will be erased and the *new one will take its place*

Note 2 - Based upon your report selection (student immunization history list or immunization due), you will see the status for that report in the top section. If the report returned with at least one student it will then place a link below corresponding to the report you selected.

Note 3 - You do not have to remain on this screen while the reports are running. You can query more students through the Find Student screen or manage your list through the Manage List screen. To get back 'check to the status screen for your reports click on the school report' link in the menu panel on your left.

Appendix 1

In the Appendix:

Online Help
VIIS Help Desk

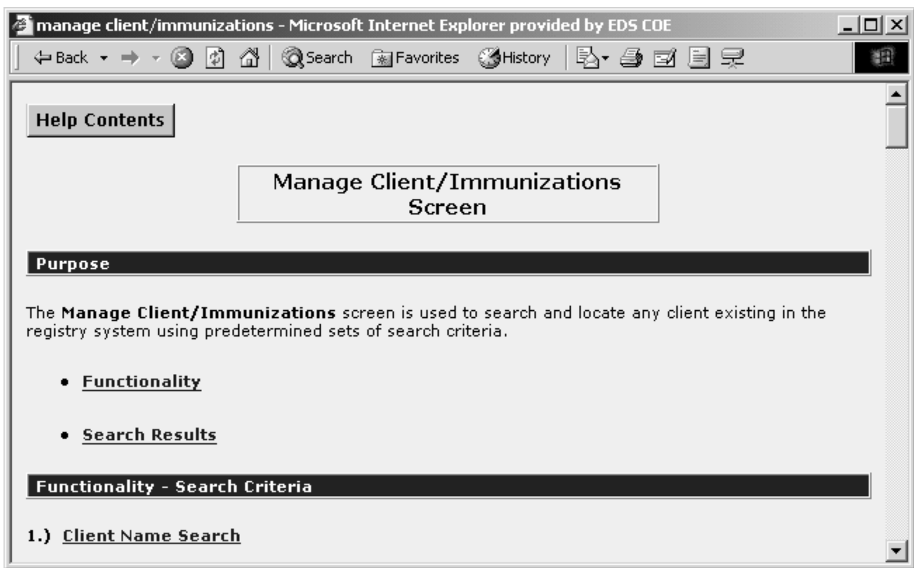
Online Help

VIIS online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in VIIS by pressing the yellow light bulb on the menu bar in the right corner of the screen.

Screen-Specific Help

To access screen-specific help, follow these steps:

1. Press the light bulb on the menu bar located at the top-right of the screen on which you would like help.
2. A box with screen-specific help information will display. This help box may have any or all of the following features:



- Purpose. This section describes what the screen is meant to do or what kind of information needs to be entered.
- Required fields. This section lists the required fields on the screen and describes the information needed for these fields.
- Other fields. This section lists and describes non-required fields.
- Information provided. This section lists the information that may be found on the screen.
- Functionality. This section gives step-by-step instructions on how to enter information on the screen or features on the screen and describes their function.

- Results. This section describes the outcome of a search, report, download, or other information entered into the database.
- User tips. This section has advice or further information on how to use this screen.

3. To view these features, you may either click the links under the Purpose section or scroll down the box.
4. To close the help box, press the X button in the top right corner of the box.

VIIS online help function includes a notes feature. Notes appear underlined and in red type; click on the "*Note" link to view.

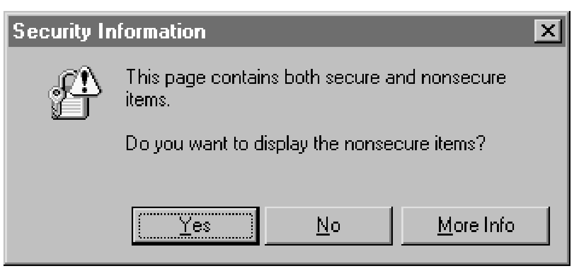
General Help

General help contains information on screens throughout VIIS. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

Contents of general help

To access the contents of general help, follow these steps:

1. Press the light bulb on the menu bar.
2. Press the Help Contents button in the top right corner of the help box.
3. A box will open asking if you want to display both secure and non-secure items; press Yes.



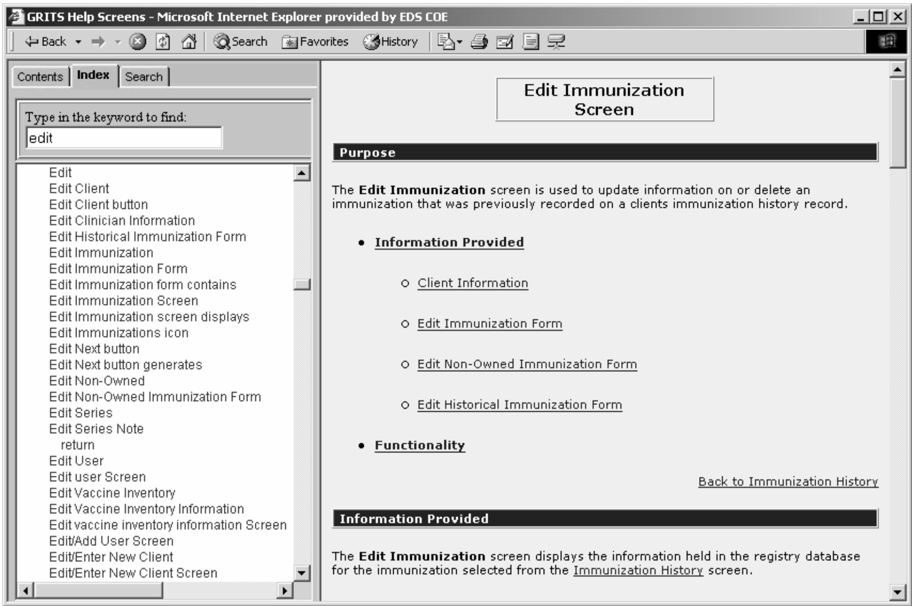
4. Press the “+” sign to the left of “VIIS” on the left side of the Contents box. A list of index items will display, with a “+” sign to the left of each item.
5. Press the “+” sign next to the index item you wish to view. A list of help items will appear.
6. Click on the name of the help item to view it. You may also click on the document icon next to the help item.
7. The help information you selected will display on the right side of the help box.
8. Use the links at the top of the screen or scroll down to view the information you need.
9. To return to a previous help screen or to skip ahead one screen, use the box’s Back and Forward buttons.
10. To collapse an index item, press the “-” sign next to the item.
11. To close out of the help box, press the X button in the top right corner of the box.

Viewing/searching the general help index

To view or search the general help index, follow these steps:

1. Follow Steps 1-3 under *Contents of general help*.

2. Press the Index tab on the top left side of the help box.



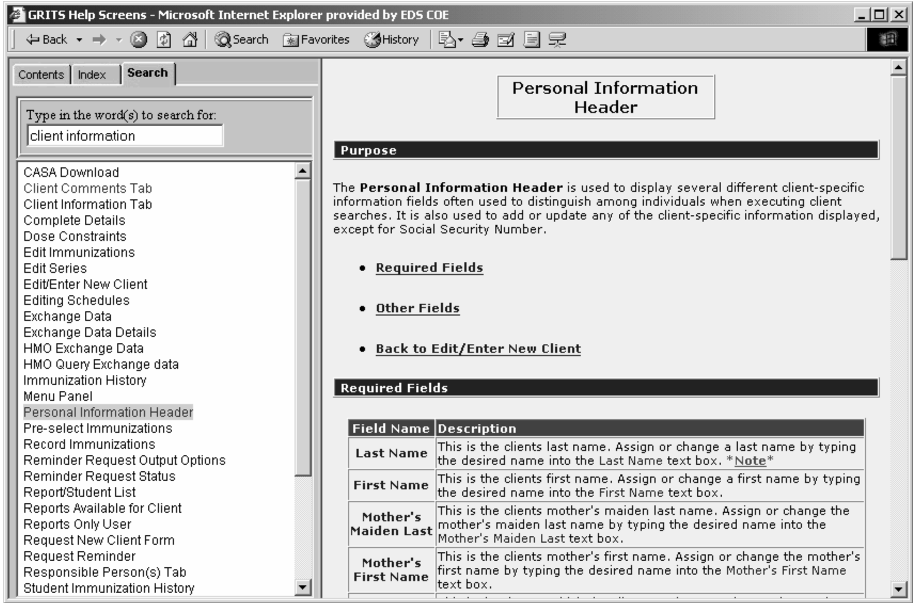
3. To find an index topic, do one of the following:
   - Use the scroll bar to view index topics.
   - Enter a keyword in the field provided. As you type, the index will display help items containing the letters you enter.
4. Click on one of the help items to view the item.
5. The help information you selected will display on the right side of the help box.
6. To return to a previous help screen or to skip ahead one screen, use the box's Back and Forward buttons.
7. To close out of the help box, press the X button in the top right corner of the box.

Searching general help

To search general help using a keyword, follow these steps:

1. Follow Steps 1-3 under *Contents of general help*.
2. Press the Search tab on the top left side of the help box.
3. Type in a word to search for in the field provided.
4. Press Enter.

5. Click on one of the help items in the box below the search field to view the item.



6. The help information you selected will display on the right side of the help box.
7. Use the links at the top of the screen or scroll down to view the information you need.
8. To return to a previous help screen or to skip ahead one screen, use the box's Back and Forward buttons.
9. To close out of the help box, press the X button in the top right corner of the box.

VIIS Help Desk

If you are experiencing difficulties or have questions regarding VIIS, you may contact the VIIS Help Desk. Several individuals staff the help desk. All calls are logged and tracked through to completion; calls are put in a pending status until a remedy to the user's problems is found.

The VIIS Help Desk hours are 8:00 a.m. to 5:00 p.m. EST, Monday through Friday.

Help Desk telephone number:	866.375.9795
Help Desk e-mail address:	*viis_helpdesk@vdh.virginia.gov*

If you experience any problems accessing or dealing with the help desk, please contact Archer Redmond, VIIS Immunization Registry Manager at (804) 864.8074 or email @ viis_helpdesk@vdh.virginia.gov.

Appendix 2

In the Appendix:

Validation of Client Entry Data

VIIS validates the information you enter on the client screen when you attempt to save the entries. If you have entered data that VIIS considers invalid, a message will appear asking you to re-enter data in the field(s). Validation varies depending on the field. Refer to the chart below for information on validation of data in various fields.

Field Name	Web Page/Section	Characters Allowed
First Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, and apostrophes. Do not save an entry that matches a disallowed name.
Middle Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Last Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.
Social Security Number	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only numeric characters and do not allow repeating or sequential strings.
Mother's First Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Mother's Maiden Last Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Responsible Party First Name	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Responsible Party Middle Name	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party Last Name	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Street Address	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
Other Address	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
PO Box	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, and periods. Do not save an entry that matches a disallowed address. Do not save quotes.
E-mail Address	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Must contain "@" symbol and period. Do not save quotes.
Phone Number	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only numeric characters and dashes. Do not save quotes.
City	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes. Do not save quotes.
Zip	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only numeric characters. Do not save quotes.

Disallowed Address Entries

Disallowed Address Entries	
DO NOT USE	NO CURRENT
UNKNOWN	MOVED
GENERAL DELIVERY	UPDATE
DECEASED	MAIL RETURNED
ADDRESS	COMMENT

Disallowed First Name Entries

The following chart lists first name entries that will not be validated in VIIS.

Disallowed First Names		
AF BABY	INFANT BO	NFN
BABY	INFANT BOY	NTXHW
BABYB	INFANT FE	PVN
BABY BOY	INFANT FEM	SIGNATURE
BABYG	INFANT *G*	SLKDFSLKD
BABY GIRL	INFANT GI	SRM
BABYB	INFANT GIR	THWJ
BABYBOY	INFANT GIRL	TOMORROW'S CHILDREN
BABYGIRL	INFANT GRL	TSWJ
BOY	INFANT M	TSWM
BOYI	INFANT MA	TSWV
BOY II	INFANT MAL	TXWM
CSS	INFANTBOY	UNK
FEMALE	INFANTGIR	UNKN
FIRE DEPT	INFANTGIRL	UNKNOWN
GIRL	INFANTMAL	UNKNOEN
GIRLI	INFANTMALE	UNKOWN
GIRL II	LCFS	UNNAMED
HBS	LSS	UNREADABLE
HRH	LSS BABY	WLCFS
ILLEGIBLE SIGNATURE	LWG	XWM
INFANT	MALE	XXX

Disallowed Last Name Entries

The following chart lists last name entries that will not be validated in VIIS.

Disallowed Last Names		
A BABY	DCS	PBABY
A F BABY	DPS	PCS
AF	DSS	RBABY
AF BABY	EBABY	SBA
AF BABY BO	F BABY	SBABY
AF BABY GI	FF	SCI
AFBABY	FIRE DEPT	SB
BCS	FWV	SC
BSC	GBABY	SIGNATURE
BABY	GARCIA INF	SMRT
BABY BOY	GIRL	SRB
BABYGIRL	GSST	SRFC
BCS	H BABY BOY	SRP
BCSW	INFANT	SS
BOY	LSS	TAO
BRT	LCFD	UN
BSC	LCFS	UNK
C A C	LCSF	UNKN
CS	LNAME	UNKNOWN
CSS	LS	UNKNOEN
CAC	LSDKFSLDK	UNKOWN
CBS	LSS	UNNAMED
CCS	LSSFC	UNREADABLE
CFCFS	LTJR	VBABY
CS	MBABY	VLK
CSS	M BABY BOY	WLCFS
CSS BABY	MALE	ZBABY
CSSW	NLN	
DSS	OBABY	

Glossary

ACIP
Advisory Committee on Immunization Practices. Along with the Centers for Disease Control and Prevention (CDC), provides written recommendations on the administration of vaccines to adults and children in the United States. These recommendations include a schedule of dosage, contraindication, and periodicity information for each vaccine. This "harmonized schedule" is the default schedule within VIIS.

Bookmark
A browser tool used for accessing Web sites quickly. After setting a bookmark at a Web page, you may return to that page simply by clicking on its bookmark, rather than entering the entire Web address. Also known as a favorite.

Browser
A software program you use to access the Internet. The two most common browsers are Netscape® and Internet Explorer.

CASA
Clinic Assessment Software Application. A tool developed by the Centers for Disease Control and Prevention (CDC) used for assessing immunization levels of clients for an immunization provider.

CDC
Centers for Disease Control and Prevention. The CDC is the lead federal agency for protecting the health and safety of people, providing information to enhance health decisions.

Client
Anyone who has an immunization recorded in VIIS by a provider organization.

Clinician
A person who administers an immunization; for example, a nurse.

Data exchange
A feature that allows you to automatically exchange immunization batch files with VIIS.

Deduplication
An automatic process that displays potential client matches to help ensure that client records are not duplicated in VIIS.

Desktop
The default screen on your computer that displays when no programs are open. The desktop contains shortcut icons that allow the user to open the represented programs and files from the desktop screen.

Favorite
See Bookmark.

GIS
Geographic Information Systems. The GIS online viewer allows geographic display of immunization data, patterns, and trends.

Grace period
The default period of time prior to and following an immunization. This time period is used to validate a client's immunization history; it does not affect immunization recommendations.

HEDIS
Health Plan Employer Data and Information Set. A performance measurement/assessment tool used to ensure quality care from managed care plans.

HL7
Health Level 7. A method of categorizing data so that it is uniform across all health reporting systems. Allows for easier data transfer among different systems.

Home page
The opening page of a Web site. VIIS's home page is the page that displays after you successfully log in. It contains announcements, release notes, resources, and the menu.

Hyperlink
A word or group of words that is underlined and appears in a colored font, usually blue, in VIIS. When you click on the underlined text, the Web site, page, or document that is described will be displayed. Also known as a link.

Immunization registry
Confidential, computerized information system containing client demographics and immunization histories. Registries enable public and private health care providers to maintain consolidated immunization records.

Login
The first screen (aside from any security/ certificate warnings) that appears after you access VIIS's Web address. The Login screen requires you to enter your organization's name, your username, and your password to access VIIS.

Logout
Button on VIIS's menu bar that allows you to exit VIIS and return to the Login screen. You may logout from any screen in VIIS.

Lot number
The unique, identifying number given to each vaccine by the manufacturer.

Menu bar
VIIS's menu bar is dark blue and appears at the top of every screen within the registry. The menu bar has several menu options: home, change password, logout, and help (light bulb). The menu bar on your Internet browser, on the other hand, is located near the top of your computer screen and contains words with drop-down lists such as File, Edit, View, Tools, etc.

Menu panel
VIIS's menu panel is a medium blue color and appears to the left of every screen within the registry. The menu panel lists all of the VIIS functions available to the user.

Ordering authority
A person with the capability of ordering an immunization for a client; a person with ordering authority is generally the client's pediatrician or primary care provider or, within public health organizations, the medical director.

PDF
Portable document file. A file format that allows you to view and print a document online in its original format.

Radio button
An input circle that, when clicked, fills with a black dot to indicate a selection. For example, on the Manage Clients screen of VIIS, the client's gender is indicated by selecting the radio button beside M, F, or N/A.

Recall Notice
A card or letter that informs a responsible person or client of immunizations that are overdue.

Release
A new version of an application, which usually includes enhancements and software fixes. Each release of an application is indicated with a number; for example, VIIS release version 3.0.

Reminder Notice
A card or letter that informs a responsible person or client of immunizations that are due in the future.

Responsible person
A parent, relative, or guardian who is associated with the client and may act as a contact. A client may also act as the responsible person for him- or herself.

Sequence
Identifies which dose is being referred to within a vaccine series. For example, a number "2" sequence indicates the second dose of the series.

Series
The compilation of doses for one vaccine that provides immunity for a certain disease or diseases. For example, the recommended series for the DTP/aP vaccine contains five doses.

Shortcut
An icon located on your computer's desktop which, when double-clicked, will open the program displayed by the icon.

Toolbar
Located near the top of your computer screen, the toolbar on your Internet browser contains several buttons, such as Back, Forward, Stop, Refresh, and Home.

Tracking schedule
A schedule of recommended vaccines, their dosage and periodicity information. The tracking schedule is used to validate a client's immunization history and makes recommendations for future vaccinations based on that history.

User roles
VIIS users are categorized into hierarchical roles that determine their level of access to the functions of VIIS. The four provider roles are Administrator, Inventory Control, Typical User, and Reports-Only.

Users
Individuals who access VIIS in some way, whether it be for printing reports, entering immunization information, tracking inventory, or entering organization-specific maintenance information.

Vaccine group
A category that describes one type of vaccination. For example, the vaccine trade names Engerix-B, Comvax, and Recombivax all fall under the Hepatitis B vaccine group.

Vaccine trade name
A unique, identifying name for a vaccine series given by the manufacturer. For example, Engerix-B is the trade name for a Hepatitis B vaccine manufactured by GlaxoSmithKline.

VIIS
Virginia Immunization Information System. A population-based Web application containing consolidated demographic and immunization history information.